

The Newsletter of FPA of Greater Kansas City

News & Views

August 2021



FPA

**FINANCIAL
PLANNING
ASSOCIATION**

**GREATER
KANSAS CITY**

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FPA of Greater Kansas City

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WELCOME NEW MEMBERS

Gregory W. Dillard
Christian Osborn

CAREER LISTINGS

Visit the FPA of Greater Kansas City [Careers Page](#)
for a full list of available positions.

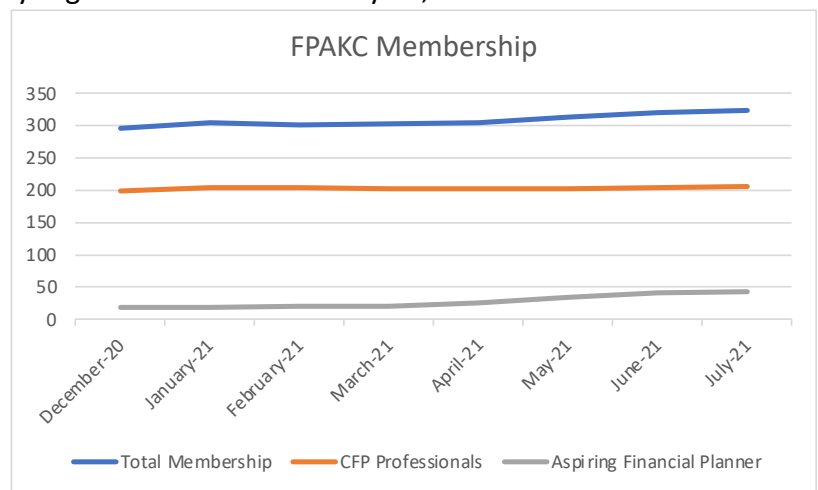
A WORD FROM THE DIRECTOR OF MEMBERSHIP

by Jason Newcomer, CFP®, Director of Membership

Hello All,

It's been way too long since we've all been able to gather together and it was great to see everyone at the chapter symposium! There are many obvious benefits to being a member of the FPA, but the sense of community, togetherness, and the ability to be around like-minded people is the one that I place a lot of value on.

Even though we haven't been able to be physically together for more than a year, we have been able to connect over virtual chapter meetings, Zoom happy hours (let's be honest, if I never had to do another one of these I'd be perfectly fine), and other creative ways to still enjoy the sense of community. Despite all the challenges our chapter has faced during the pandemic, we've still seen growth in our membership numbers. See the graph below that outlines our membership numbers.



The virtual externship had a lot to do with the number of aspiring financial planners in our chapter more than doubling from 18 to 43 this year. Seeing the number of CFP Professionals hold steady has been a great indicator that our chapter is still bringing value to our members.

For new members, and even members who have been around for a few years, it can take some time to understand all of the benefits of their membership. Being a member of the FPA is so much more than attending chapter meetings. For example, this month, we held the inaugural Symposium, with Michael Kitces delivering as the keynote speaker and several breakout sessions where we had the opportunity to learn and earn CE credits.

If you're an aspiring financial planner, you should consider attending the NexGen's Happy Hour on September 2nd at Tabard's Kitchen in Overland Park. There, you'll have the opportunity to meet other financial planners who are in the beginning stages of their careers and who can share experiences with you about their journey in our profession.

Want to engage with other FPA members around the country? Through the [FPA Connect website](#), you can access and participate in discussion through Knowledge Circles. There you can discuss practice management, economics, investing, tax, and estate planning.

Lastly, if you're interested in giving back to your community, there are volunteer opportunities such as educating and pro bono financial planning.



Make sure you're taking full advantage of your membership with the FPA! If you have any questions about getting involved, whether it's committee involvement or volunteer opportunities, please contact me by e-mail (jason@barberfinancialgroup.com), or find me in-person at the next Chapter Meeting.

Jason Newcomer, CFP®

2021 BOARD OF DIRECTORS



Chair of the Board

Mark Albright, CFP®, CRPC®
Caliber Wealth Management



President

Tyler Landes, CFP®, AIF®
Tandem Financial Guidance, LLC



President Elect

Carrie Ohm, CPFA
Resources Investment Advisors



Secretary/Treasurer

Todd C. Ericson, CFP®
Stepp & Rothwell, Inc.



Director of Communications

Jack Giardino, CFP®
Mariner Wealth Advisors



Director of Community Outreach

Allison Cooley, CFP®
Mana Financial Life Design



Director of Government Relations

Cole K. Foster, CFP®



Director of Membership

Jason Newcomer, CFP®
Barber Financial Group



Director of NexGen

Landon Warmund, CSLP®
Reliant Financial Services



Director of Partnerships

Jeffrey Hrabe, CMFC®
Cavanal Hill Distributors Inc.



Director of Programs

Ben Skilling, CFP®



Director of Public Awareness

Jamie A. Bosse, CFP®, RFC
Aspyre Wealth Partners

Directors of Student Mentoring and Career Development



Mary Dorn, MBA
University of Missouri



Derek Lawson, Ph.D., CFP®
Kansas State University

Directors at Large



Jennifer Calvi, CFP®
Creative Planning, Inc.



Michael Diederich, CFP®
UMB



Angela Robinson, CFP®, ChFC, CRPC,
CLF, CRPS, APMA, BFA
Robinson Wealth Advisors



Chapter Executive

Brandy Johnson, CAE
FPA of Greater Kansas City

UPCOMING CHAPTER MEETINGS

OCTOBER 20, 2021

11:30 am - 2:00 pm

Embassy Suite-10401 S. Ridgeview Rd, Olathe, KS 66061



**Integrating Client Psychology
into Your Practice**

Martin Seay, Ph.D., CFP®
*Kansas State University
2021 FPA Chair*



Crypto/Bitcoin

Tyrone V. Ross, Jr.
*CEO, Onramp Invest
Founder, 401STC*

THIS MEETING SPONSORED BY:



NOVEMBER 17, 2021

3:00 - 5:00 pm

Embassy Suite-10401 S. Ridgeview Rd, Olathe, KS 66061



Advising Clients through the Toughest Times of Life

Amy Florian
CEO, Corgenius

Registration will be available soon for both events!



Take 5

August 2021

The All-New FPA Marketplace: Savings on the Products and Services You Need

We are pleased to announce the all-new FPA Marketplace powered by the Chalice Network® is now available to our valued FPA members. Through the Marketplace, you can access many benefits designed for FPA members, especially our various insurance programs. In addition, you can now access BenefitHub that offers you potentially thousands of dollars in savings on a wide range of services and programs from top companies like Verizon, Costco, Geico, Avis, Hertz, Disney, AMC, Gap, and many more. [Access the new FPA Marketplace now!](#)

Register now! Unplug at FPA Annual Conference 2021

It's time to unplug, get out of those sweatpants, get off Zoom, and enjoy what Columbus, Ohio has to offer with the rest of the FPA community at FPA Annual Conference 2021. Whether that be exploring one of the city's many craft breweries or debriefing after a breakout session, FPA Annual Conference is the best way to connect with your peers who genuinely understand your profession. Constructed for financial planners by financial planners, FPA Annual Conference – to be held September 22-24 – will provide the practical content you need with the valuable community you desire. [Register today.](#)

Join the National NexGen Leadership Team: Please apply by August 20

We are searching for individuals who will help lead FPA NexGen in 2022! Join NexGen leadership to help guide and influence the next generation of financial planners. Work with an incredible team of like-minded individuals to build up and support a national network of NexGen communities. You will need to submit a resume, two letters of recommendation, and respond to some brief questions. [Review the open FPA NexGen positions and apply.](#)

FPA Residency Can Help You Become the Financial Planner You Want to Be

There is no better way to gain the confidence and skill of an a seasoned professional than to experience [FPA Residency 2021](#) at the Hyatt Regency Aurora in Aurora, Colorado, November 5-10. This unique, immersive event allows you to experience real financial planning scenarios, build relationships with mentors, and learn to listen and support clients. [Register by September 13](#) to save \$400 with Advance Registration!

Now Available: The 2020 FPA Annual Report

FPA is pleased to announce the availability of the 2020 FPA Annual Report covering the work of the Association in 2020, and including last year's audited financial statements, an update on the OneFPA Network beta test, and more. Get caught up on how your Association is working for you and the profession. [Check out the Annual Report now.](#)

FPA and CNBC co-branded 'Money Matters' Newsletter

Want the latest investments and personal finance headlines delivered to your inbox twice each month? FPA and CNBC are collaborating to publish the co-branded *Money Matters* newsletter exclusively for FPA members. Delivered twice each month, the newsletter delivers the latest headlines from CNBC that you need to read. [Opt-in for Money Matters now!](#)

Take 5 is Brought to You by Ryan Insurance Strategy Consultants

Since 2009, FPA has partnered with Ryan Insurance Strategy Consultants to offer FPA members an industry-leading Long Term Disability plan, and recently launched a group voluntary Term Life plan. They also consult with advisory firms in making insurance product recommendations and their network of advisers are available to help solve more complicated insurance planning issues. Learn more at associationinsurancebenefits.com.



CHAPTER PLATINUM PARTNERS



American Century
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LearningQuest®
529 Education Savings Program



GREATER KANSAS CITY
COMMUNITY FOUNDATIONSM



FAIRWAY®

INDEPENDENT MORTGAGE CORPORATION

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CHAPTER PARTNERS

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OSTERWEIS

CAPITAL MANAGEMENT

SILVER PARTNERS

Ash Brokerage

Capital Group/American Funds

CarePatrol

Cavanal Hill

UMB

BRONZE PARTNERS

BlueRock Capital Markets

Waddell & Reed

CALENDAR OF EVENTS

September 2, 2021

5:00 - 6:30pm

NexGen Happy Hour

Tabards Kitchen, Overland Park

September 23, 2021

8:30-10:30 a.m. (breakfast included)

Retirement Planning: Senior Living Options and Associated Costs

Sponsored by: CarePatrol

BridgeSpace: 210 SW Market St, Lee's Summit, MO 64063

October 20, 2021

11:45 a.m.-2:00 p.m.

October Chapter Meeting

Embassy Suites, Olathe

Integrating Client Psychology into Your Practice

Martin Seay, Ph.D., CFP®

Crypto/Bitcoin

Tyrone V. Ross Jr

November 17, 2021

3:00-5:00 p.m.

November Chapter Meeting and Social

Embassy Suites, Olathe

Advising Clients through the Toughest Times of Life

Amy Florian, CEO of Corgenius

**For a full list of events and registration
please visit our website at**

<https://www.financialplanningassociation.org/fpa-greater-kansas-city-events>