



2016 Committee Descriptions

❖ Communications ❖

Purpose: The Communications Committee's purpose is to facilitate quality communication between chapter members, FPA national, the local board, and our association partners.

Activities/Events: The committee will oversee content and design of the chapter website and contribute to and assist in editing the monthly chapter newsletter. Committee members will work to ensure that local and national chapter news, information and member benefits are communicated to chapter members.

Contact: Rachael Graf, Director of Communications, (816) 587-7526, rachael@prosperityplanninginc.com

❖ Community Outreach ❖

Purpose: The Community Outreach Committee provides free financial planning services and education to the underserved in our community. We subscribe to the old adage, "Give a man a fish and he will eat for a day. Teach a man to fish and he will eat for a lifetime."

Activities/Events: Your help is needed on the committee, or just as a one-time volunteer, if you can do any of the following:

- Provide one-on-one counseling to our constituents as they are referred to us.
- Give a presentation, which has already been prepared, to a group of our constituents
- Share your knowledge of any topics that you think may affect the financial lives of the underserved. E.g. Budgeting, credit repair, government benefits
- Connect us with charitable organizations that are in need of our services

Contact: Dorinda Emerson, Director of Community Outreach, (913)980-7040, emersonfinancialplanning@gmail.com

❖ Government Relations ❖

Purpose: The Government Relations Committee purpose is to help FPAGKC members be aware of all the key governmental issues that affect their profession and practice. We want to proactively influence legislation that supports the mission of the FPA and educate and communicate that mission to the community in which we serve.

Contact: Evan Mayhew, Director of Government Relations, (816)340-4837, evan_mayhew@americancentury.com

❖Membership❖

Purpose: The purpose of the Membership Committee is to develop, coordinate, and promote FPA membership recruitment and retention initiatives within the local chapter. The committee coordinates new member welcome and orientation and encourages new and existing member participation.

Activities/Events: The Membership Committee plans and organizes a wide variety of events including a new member breakfast, Royals game social, volunteer appreciation reception, CFP® exam outreach and FPA day at Harvesters.

Contact: Bing Chen, CFP®, CFA®, Director of Community Outreach, (816) 860-7588, bing.chen@umb.com

❖NexGen❖

Purpose: To foster a sense of community among the members of our industry in the 22-36 age range while increasing the presence of this demographic in our local chapter.

Activities/Events: Quarterly roundtables and monthly happy hours.

Contact: Tyler Landes, Director of NexGen, (816) 945-2230, tyler@tandemguidance.com

❖Partnerships❖

Purpose: The primary focus of the Partnerships Committee is building strong relationships with strategic “Partners” who are committed to the on-going success of our organization. It is through these partnerships that the Greater Kansas City FPA is able to successfully fund our programs and operations.

Activities/Events: Committee members will identify potential partners who may be interested in providing funds, resources, and/or speakers for chapter meetings and events. The Partnership Committee works to ensure that all partners receive full benefits as defined by their partnership level of commitment (Silver, Gold, or Platinum) and maintains a strong relationship with existing sponsors in an effort to enhance the overall partnership experience. The committee coordinates with the Programs chair to deliver desirable programs and events to our membership.

Contact: Kelly Hokanson, CFP®, Director of Partnerships, (913) 649-0827 x202, kelly@financialgoddess.com

❖Programs❖

Purpose: The purpose of the Programs Committee is to develop and plan programming for FPA chapter meetings. Specifically, the committee is charged with obtaining speakers with timely and relevant topics that may or may not provide continuing education credit, but will address membership's need for valuable, educational content.

Activities/Events: Committee members research program content and secure speakers. The committee works directly with presenters to ensure day of meeting logistics have been satisfied and coordinate the communication of all events to the local chapter.

Contact: Teri Byrne, RP®, Director of Programs, (913) 451-0900, tbyrne@bokf.com

❖Public Awareness❖

Purpose: The purpose of the Public Relations Committee is to foster a positive image of the financial planning profession through the media. The committee will utilize the media to promote awareness of financial planning and the Greater Kansas City Chapter of the FPA. The Public Relations Committee will also be a source for the business news media to provide financial information to the consumer through print, television and radio.

Activities/Events: Efforts include participation in the NBC ActionNews Call for Action Financial Planning call in program during Financial Planning Week. The committee responds to local and national media requests for interviews relating to financial stories. Members of the committee will have the opportunity to be interviewed on TV or radio and or quoted in local and national print publications. The Public Relations Committee will foster the FPA's relationship with local media and promote the activities and mission of the FPA.

Contact: Lucas Bucl, CFP®, Director of Public Awareness, (913) 345-1881, lbucl@makinglifecount.com

❖Student Mentoring and Career Development❖

Purpose: To create and maintain a connection between FPAGKC chapter leaders, members, and program directors and members at our affiliated student chapters.

Activities/Events: Activities include hosting a "Career Day" to bring together students and local employers. The committee will also evaluate applicants and award scholarships to students from partner universities. Committee members will assist with job postings on the local website and seek meeting speakers that will provide timely information for members who are transitioning in and out of the profession.

Contact: Charles Connely, Director of Student Mentoring and Career Development, (816) 235-5131, cconnely@ccim.net