

NexGen Gathering Is a One-of-a-Kind Experience

On the weekend of June 20–22, I had the opportunity to attend this year’s FPA NexGen Gathering and help celebrate an important milestone—FPA NexGen’s 10th anniversary.

Sixty of FPA’s best and brightest next generation of advisers from 18 states were in attendance. We were supported by industry leaders, including FPA President Janet Stanzak, Chair Michael Branham, and President-elect Ed Gjertsen II. Also in attendance were past-presidents Elizabeth Jetton and Marty Kurtz along with industry thought leaders Michael Kitces and Dick Wagner. Jude Boudreaux and Bob Veres served as facilitators to the world-café style discussions we had during our 48 hours together.

The NexGen Gathering isn’t your typical conference. There is no real set schedule. It began Friday afternoon with everyone in a circle, sharing who we are, where we’re from, and what we expected to get out of the weekend. Next, we broke up into smaller groups and discussed what was on our minds before coming back together in a larger group to share our group outcomes. This set the stage for our Saturday discussion topics.

Saturday began with everyone coming full circle and expressing their feelings in just one word. FPA leadership spoke about the issues they are working on and how NexGen fits into their plans, as well as their hopes for the future of the profession. The rest of the day consisted of breakout sessions on topics that were voted on the day before.

Two-and-a-half hours for lunch and

networking gave us a chance to walk around campus and speak with prior and new connections about where they are in their careers. It is not often you get the chance to speak to Michael Kitces one-on-one for a lengthy period, particularly as a young professional (at 26, I was one of the youngest attendees). The power of the NexGen Gathering is that everyone is equal, with their own ideas, values, and goals. The ability to share that with industry leaders and peers in an intimate setting is truly a one-of-a-kind experience.

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After lunch we came back full circle and expressed in one word how we were feeling before breaking off into more sessions.

The NexGen Gathering is built on trust and is touted as a “safe place to hold valuable discussions,” so I don’t want to get into too much detail, but some themes from our discussions included: we must evolve with our clients; use technology to build efficiency; embrace failure; be okay with uncertainty and change; build a brand and create visibility; realize social media is powerful; join a study group; and ask, do you run your business or does your business run you?

I have been an FPA member for two years, and this was my second FPA NexGen Gathering. Both times I have left feeling refreshed, energized, and eager to help advance the profession of financial planning. Attending this event is one of the best things I have done for my career. Many other attendees share this feeling.

If you are a financial professional under the age of 36, I strongly suggest you get involved in your profession and I hope you attend next year’s FPA NexGen Gathering. It will change the way you feel about the profession and get you motivated to work hard for your professional, academic, and personal goals.

If you are a firm owner and/or business manager with NexGen employees, I urge you to let your employees get involved with your local FPA chapter as well as let them attend the annual NexGen Gathering. You won’t find a cheaper event with as much value for your young employees.

P.S. Search the Twitter hashtag: #FPANexGen to view Tweets and event pictures.

—Derek R. Lawson
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Letters

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