MONEY QUOTIENT RETREAT 2022

Portland, OR | October 25-27 | JupiterNEXT

EVENT INFORMATION PACKET

NURTURING
RESILIENT & REWARDING
CLIENT RELATIONSHIPS IN A
RAPIDLY CHANGING ENVIRONMENT

ABOUT THE RETREAT

The MQ Research Consortium recently updated a 15-year-old study to explore how demographic shifts, economic uncertainties, environmental threats, political transitions, global unrest, and a worldwide pandemic have forever altered the needs and expectations of financial planning clients. The key question explored was, "Have the factors that foster higher levels of client trust and commitment changed over time?" At the 2022 MQ Retreat, lead researchers Carol Anderson, M.S., and Deanna Sharpe, Ph.D., will present the results and discuss the implications of this groundbreaking study.

In addition, notable scholars and practitioners will use this information as a springboard for sharing insights and knowledge that will equip you to meet current challenges and to serve as beacons in the lives of your clients for many years to come:

- **Amy Mullen, CFP®**, - President of Money Quotient, Inc.
- **Carol Anderson, M.S.** - President of MQ Research & Education
- **Timi Joy Jorgenson, Ph.D.** – Assistant Professor and Director of Financial Education & Well-Being at American College
- **Meghaan Lurtz, Ph.D., CFP®, FBS™** – Lecturer; Writer and Senior Research Associate, **kitces.com**
- **Deanna L. Sharpe, Ph.D., CFP®, CRPC®, CRPS®** – Associate Professor and Director of CFP Board-Registered Program, University of Missouri
- **James Hindes** - Founder of ENOW Financial.
- **MQ Implementation Program Consultants**
- **MQ Advisory Board Members**

VENUE & LODGING

This year's event will be held at the **JupiterNEXT Hotel** on the east side of the Willamette River in Portland's Kerns neighborhood.

Room Reservations: Money Quotient has reserved a block of rooms at the hotel for attendees. Please use **this link*** to reserve your room. Please note that you will not need to enter a discount code as long as you use this link.

Special Rate Deadline: The final date to register and book your hotel room at this discounted rate is **October 4**.

Extended Stays: If you would like to stay additional days at the hotel, please book the MQ Retreat dates through the link above, then call the hotel at 503-234-7767 to extend your visit. You will need your booking confirmation code.

ABOUT THE AREA

Located in the state's northwest area, near the Washington-Oregon border, Portland is smaller and more laid-back than its nearest metropolitan neighbor, Seattle.

It celebrates eco-friendliness, equal rights, art, music, independent business, outdoor activities, food, coffee, and - especially - beer and wine.

The Willamette River divides Portland into east and west districts. A main thoroughfare running north and south divides the city further, resulting in six "quadrants" - Southwest, Southeast, Northwest, North, Northeast, and East - each with its own neighborhoods, restaurants, bars, pubs, parks, and shops brimming with the unique flavor and flair of their quadrant.

Portland is filled with greenery and boasts an abundance of urban parks. Forest Park is the largest wilderness park within city limits in the United States, covering more than 5,000 acres. Clear days in Portland offer views of both Mt. Hood and Mt. St. Helens and the opportunity to take a stroll along the Willamette River.

MEET AND GREET

October 25, 2022 ~ 6:00 pm - 9:00 pm

Our 2022 MQ Retreat experience begins with a Meet and Greet reception the evening of October 25th. This event is included in your registration fee for the MQ Retreat.

Join us at **Hey Love**, a lush tropical bar & restaurant located in the lobby of the JupiterNEXT hotel. Money Quotient will provide snacks and a meeting area, and guests may also order drinks and other food items at the bar or with our servers.

We will be gathering for casual drinks and conversation. This will be a great opportunity to recharge after a day of traveling in a relaxed and congenial setting. Take time to reconnect with old friends, welcome first timers, and prepare for the next two days of inspirational presentations and stimulating conversations.

C E L E B R A T I O N ! !

October 26 ~ 6:00 pm - 9:00 pm

Our annual **Celebration Dinner** will take place in the same location as our MQ Retreat. Appetizers, a buffet dinner, and two drink tickets are included in the price of your MQ Retreat registration. A cash bar will be available for additional beverages.

Schedule:

6:00 pm - 7:00 pm: MQ will host an hour-long cocktail hour, featuring drinks and hors d'oeuvres.

7:00 pm - 9:00 pm: **Hey Love** will cater our Celebration Dinner. The menu will include gluten-free and vegetarian options.

**** Please let us know if you have allergies or dietary restrictions by contacting us, and we will do our best to accommodate your needs.***

S P E A K E R S & T O P I C S

Do Factors that Foster Client Trust and Commitment Evolve Over Time?

Presented by: Carol Anderson, M.S., President of MQ Research & Education

The 2006 "Survey of Specific Elements of Communication that Affect Trust and Commitment in the Financial Planning Process" provided empirical support for the critical role that "life planning" communication plays in developing successful planner-client relationships. However, in the 15 years since that research was conducted, several significant economic events and social changes have occurred with broad implications for financial planning engagements. In 2021, the MQ Research Consortium replicated the original study to gain new insights regarding the factors critical to developing and preserving client trust and commitment in an ever-changing environment.

1.0 CFP CE pending acceptance of CFP Board

The Art and Science of Virtual Meetings

Presented by: James Hindes, MBA

James Hindes of ENOW Financial runs a 100% virtual practice, with meetings that successfully incorporate life planning tools into the client experience. James will discuss both the Art and Science of running a successful virtual meeting that incorporates both EQ (Emotional Awareness) and IQ (Financial Knowledge). In this session you will learn:

1. The pros, cons, and myths of virtual meetings
2. How to "read the room" when you're not in the room
3. The benefits of narrating the obvious, asking permission, and pausing to take notes
4. How to leverage web-based qualitative data gathering forms and tools for client engagement
5. How to tailor your physical environment to create a successful virtual financial planning meeting experience
6. The importance of financial planning visualizations tailored for screens

Improving Client Relationships and Outcomes through the Inclusive Financial Wellbeing and Empowerment Model

Presented By: Timi Joy Jorgensen, Ph.D.

Learn how individual identity shapes the way we think, feel, behave, and interact with our financial world. Dive into detailed findings that can unlock structural, behavioral, and cultural barriers your clients face in achieving financial health. Explore tools and techniques to navigate the planner / client relationship and create more meaningful engagement with your clients.

1.5 CFP CE pending acceptance of CFP Board

Financial Stress & Anxiety: Keeping Yourself & Clients Mentally Healthy

Presented By: Meghaan Lurtz, Ph.D., CFP®, FBS™

In today's digital-age culture where nearly all sources of news and media are instantly accessible and information overload is a normal state of being, it is not surprising that stress and anxiety are very commonly experienced in our fast-paced society. And in fact, stress and anxiety about specific financial problems are what most often drive people to seek the help of an advisor in the first place!

1.5 CFP CE pending acceptance of CFP Board

Title Coming Soon

Presented By: Amy Mullen, CFP®

Coming soon

Financial Planning Conversations in Challenging and Changing Times

Presented By: Deanna Sharpe, Ph.D., CFP®, CRPC®, CRPS

Helping clients navigate change is an important objective of financial planning. But what if change has a profound effect on the profession itself? The recent covid crisis and growing demand for cultural competence calls for review of evidence-based best practices in light of these challenges. Specifically, in what ways and to what extent do client financial anxiety, virtual meeting navigation, and cultural awareness shape financial planning conversations and development of client trust and commitment?

1.0 CFP CE pending acceptance of CFP Board

SCHEDULE

DAY	DATE	START	END	EVENT
Tuesday	October 25	6:00 pm	9:00 pm	Meet and Greet
Wednesday	October 26	7:30 am	8:30 am	Breakfast
		8:00 am	8:30 am	First Time Attendees
		8:30 am	12:00 pm	Retreat Program
		12:00 pm	1:00 pm	Lunch
		1:00 pm	5:00 pm	Retreat Program
		6:00 pm	7:00 pm	Happy Hour
		7:00 pm	9:00 pm	Celebration Dinner
Thursday	October 27	7:30 am	8:30 am	Breakfast
		8:30 am	12:00 pm	Retreat Program
		12:00 pm	1:00 pm	Lunch
		1:00 pm	5:00 pm	Retreat Program
		5:00 pm	6:30 pm	Happy Hour

REGISTRATION

REGULAR RATE - **$1200** STREAMING/ ON-DEMAND RATE - **$400**

Deadline to register is October 11, 2022.

Retreat Cancellation Policy

- If you cancel **ON OR BEFORE SEPTEMBER 27, 2022**, you will receive a **FULL REFUND**, minus a $100.00 processing fee.
- If you cancel **BETWEEN SEPTEMBER 28 – OCTOBER 11, 2022** you will receive a **50% REFUND**, minus a $100.00 processing fee.
- **NO REFUND** will be provided for cancellation after **OCTOBER 11, 2022**.
- **NO REFUND** will be provided to individuals who are registered but do not attend the Retreat (i.e., "No Shows").

REGISTER