

*A world of questions is a world of possibility.
Questions open our minds, connect us to
each other, and shake outmoded paradigms.*

—Marilee Adams

Nov 7th & 8th ⚡ Portland, OR ⚡ Benson Hotel

2018 Money Quotient Retreat

The Power of Questions: Unlocking the Possibilities for Personal and Professional Growth

November 7-8, 2018



ABOUT THE RETREAT

In *Change Your Questions, Change Your Life*, author Marilee Adams describes her vision of how individuals, families, institutions, and communities can be transformed by the **“spirit of inquiry”**:

Our orientation would shift from one of answers and opinions to one of questions and curiosity. We would see quick judgments, fixed perspectives, and old opinions give way to exploration, discovery, innovation, and cooperation.

Adams further explains: “What makes this kind of change so practical is that it begins with each one of us, right here, right now. We have only to ask the right questions to begin.”



At Money Quotient, we believe in the power of questions. Questions are not only at the heart of our 5-E Model of Financial Life Planning, but also the key to unlocking the potential in our personal and professional lives.

Therefore, we are excited to dedicate our 2018 MQ Retreat program—November 7-8, 2018—to exploring the many facets of asking and responding to important questions about life and money.

SAMPLING OF RETREAT SESSIONS

Tracy Beckes, MBA

Invent the Future: Understanding & Embracing Qualities of “True” Leadership

Leaders who are committed to thriving engage with work and with life by harnessing the benefits of investigating their learning edge. They regularly deploy practices to illuminate their blind spots and disrupt their reactivity. Those who follow this path awaken intentional change within. They attend to the inner conditions that contribute to success by shaping a culture of learning, curiosity, and collaborative accountability.



Tracy Beckes, MBA, offers a pioneering approach to developing your unique leadership style that will transform your business and your life. Regardless of your firm's size, this material will inspire you to reconnect with your original passion for serving clients, streamline and simplify how you make decisions and maximize your productivity.

Brian Farr, LPC

How To Ask A More Beautiful Question

Would you like to have more meaningful conversations with your clients? This presentation will explore the simple art of asking those questions that can reveal deeper truths, valuable insights, and unexpected wisdom. Good questions can open up important pathways. Brian will share stories and lessons from his clinical experience as a financial therapist, and draw on teachings from *A More Beautiful Question*, the inspiring book by Warren Berger.



Brian Farr is a Financial Therapist and Licensed Professional Counselor in Portland, Oregon. Since 2002 he has brought counseling skills into complex conversations about money. Brian uses a variety of therapeutic and financial techniques to guide individuals and couples in identifying the patterns behind their actions, and then create successful strategies for moving forward. Prior to becoming a professional counselor, Brian was a founding partner of an investment management firm, an owner/manager of a personnel agency, and a commodity broker at the Chicago Board of Trade.

Derek Lawson, CFP®

A Multidisciplinary Approach to Mastering Purposeful Inquiry and Effective Client Engagement within the Financial Planning Process

The fields of behavioral finance, financial psychology, and financial therapy have emerged to help bridge the gap between the nuts-and-bolts of financial planning and our understanding of why clients make the decisions they make concerning money. The purpose of this session is offer a framework for integrating insights, theories, and tools from these fields into the six-step financial planning process. This approach enables planners to be more effective in combatting client stress and anxiety, helping clients change destructive financial behaviors, overcoming client resistance to change, and keeping clients engaged in an ongoing financial planning process.



Derek is a doctoral candidate in Personal Financial Planning at Kansas State University studying financial therapy, physiological stress, relationship satisfaction, and consumption decisions of young adults. He will be joining the Personal Financial Planning Department at Texas Tech University this Fall as an Instructor while he completes his dissertation work. In addition, Derek and co-author Brad Klontz, Psy.D., CFP® were recently named as recipients of the 2018 Montgomery-Warschauer Award for their *Journal of Financial Planning* article, "Integrating Behavioral Finance, Financial Psychology, and Financial Therapy into the 6-Step Financial Planning Process."

Russell Kroeger, CFP®, EA

Your Process, Their Journey

It's easy to take for granted that our clients have a strong sense of the overarching themes they want to experience during their lives. "Typical financial planning clients" have often experienced transitions that crystallize their trajectory and they rely on our financial planning process to help gain clarity on the specifics, anchoring their decisions to what is most important to them and fulfilling their commitments.



But what does our process look like for clients who have more open-ended themes? How can we help clients understand the trade-offs implicit in life decisions when the future is mostly ambiguous? *Your Process, Their*

Journey leverages MQ philosophies to master the art of powerful questions in co-creating your client's future. This presentation is an open-ended discussion on developing client relationships that would benefit from on-going iterations between anchoring and orienting as clients explore a life of subjective well-being.

Russell founded Paradigm Wealth in April 2017. He speaks at conferences, is a member of Money Quotient's Research and Education Task Force, and is currently pursuing an M.S. in Advanced Financial Planning at Golden Gate University. Giving back to the financial planning community is also very important to him. Russell served the Financial Planning Association (FPA) as the 2016 Director of San Francisco's NexGen community (a subset of FPA members 36 and under) and currently serves as the Director of Advocacy for the San Francisco chapter, a Representative of the FPA of California State Council, and the NexGen Representative for the OneFPA Advisory Group.

ABOUT THE AREA

Portland shines as an urban jewel gently nestled on the Willamette River in Oregon State. Located near the Washington-Oregon border, Portland is smaller and more laid-back than its nearest metropolitan neighbor, Seattle. Portland celebrates eco-friendliness, art, music, independent business, outdoor activities, food, coffee, and (in a major way) beer.



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" (at one time there were only four, but the terminology stuck as the city grew)—Southwest, Southeast, Northwest, North, Northeast, and East—each with its own neighborhoods, restaurants, bars, pubs, parks, and shops brimming with the unique flavor and flare of their quadrant.

Portland is filled with greenery and boasts an abundance of urban parks. In fact, Portland's 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 lovely views of both Mt. Hood and Mt. St. Helens and the opportunity to take a relaxing stroll along the banks of the Willamette.

Tourism

Portland offers tourism activities for a wide variety of tastes. In most areas of Portland, you will find ample independent small businesses to appease your shopping desires. If great food and drink are on your agenda, the city definitely

has you covered in spades with a nearly endless selection of restaurants, cafés, bars, pubs, and food carts. If you like biking, hiking or otherwise enjoying the outdoors, Portland has a vast park system and a number of trails throughout the city. Getting around Portland is easy thanks to an extensive public transit system which includes light rail and a street car.

[Powell's City of Books](#), which covers an entire city block and contains more than 1.5 million books in 3,500 different sections.

[Lan Su Chinese Garden](#), an authentically built Ming Dynasty style garden.

The [Portland Saturday Market](#), the nation's largest weekly open-air arts and crafts market.

The [Portlandia Sculpture](#), the second-largest hammered copper statue in the United States, after the Statue of Liberty.

The [Portland Art Museum](#), the oldest museum in the Northwest.

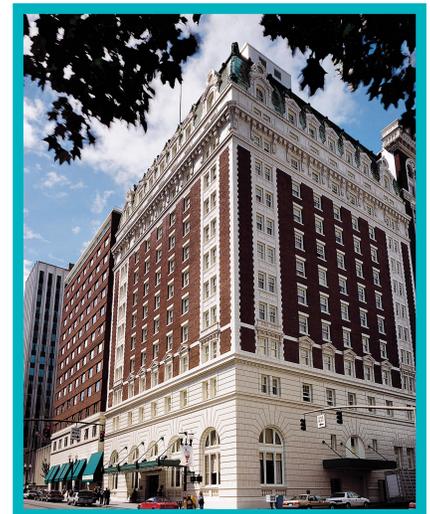
Visit [TravelPortland.com](#) for additional tourism information.

ABOUT THE VENUE

Explore all Portland has to offer from one of the city's most treasured historic landmarks. Founded in 1913, The Benson features elegant European design with a host of modern amenities. **The Benson** has hosted U.S. Presidents and CEOs for years.

Conveniently located, The Benson puts you within walking distance to all of the shopping, dining, and entertainment of the Pearl District, Pioneer Square, and downtown. Famous boutiques, bookstores, breweries, and performing arts are just steps away. **Click [HERE](#) to learn more about this venue!**

We are happy to announce that MQ Retreat participants are eligible to get a discounted room rate at The Benson. When calling in to make your reservation, please make sure to mention that you are with **Money Quotient** to get the special Money Quotient rate! Please call in to make your reservation rather than booking online as the reservation desk will be able to ensure that you get the nights you want at the discounted rate. Deadline for room block guarantee is **Friday, October 5, 2018**. Call **888-523-6766** or **503-228-2000** today!



MEET AND GREET

November 6, 2018 ~ 6pm-9pm



Our 2018 MQ Retreat experience begins with a Meet and Greet reception the evening of November 6th. This event is included in your registration for the MQ Retreat. Join us in a cozy section of the Benson Hotel's beautiful lobby that is reserved for our group.

We will be gathering by the fireplace for cocktails and appetizers. 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.

CELEBRATION DINNER

November 7, 2018 ~ 6:30pm-9pm

A Celebration Dinner will take place following the first day of our MQ Retreat. This is a time to enjoy delicious food and wine while also savoring the insights and relationships that were nurtured throughout the day.

Since September of 2000, Bluehour has been Portland's premier modern American restaurant. The dining room at Bluehour is modern & classically designed by renowned architect Brad Cloepfil, who also conceived the adjacent W+K headquarters. The space affords intimacy and conviviality in a labyrinth of corners. For casual or special occasions Bluehour has different menus to suit many cravings.



Bluehour is a farm to table restaurant with a menu that changes throughout the year to provide guests with only the freshest, local ingredients available. We are looking forward o what they have in store for us in November!

Your guests and traveling companions are welcome to join us. The more the merrier! The cost to attend the Celebration Dinner is \$75.00 per person, which includes passed appetizers, a gourmet main course, and dessert. A cash bar will be open for beverage service.



We have a special treat this year as our special entertainment will be provided by one of our own MQ Team Members! Outside of his daily role with Money Quotient, Jim Comeau loves entertaining people in the Portland area by hosting weekly trivia nights in local venues. At this year's MQ Retreat Celebration Dinner, we look forward to splitting into teams and enjoying a version of his game with you!

SCHEDULE

DAY	DATE	START	END	EVENT
Tuesday	November 6	6:00 pm	9:00 pm	Meet and Greet
Wednesday	November 7	7:00 am	8:00 am	Breakfast
		8:00 am	12:00 Noon	Retreat
		12:00 Noon	1:00 pm	Lunch
		1:00 pm	5:00 pm	Retreat
		5:00 pm	6:30 pm	Happy Hour
		6:30 pm	9:00 pm	Celebration Dinner
Thursday	November 8	7:00 am	8:00 am	Breakfast
		8:00 am	12:00 Noon	Retreat
		12:00 Noon	1:00 pm	Lunch
		1:00 pm	5:00 pm	Retreat
		5:00 pm	6:30 pm	Happy Hour

RATES AND REGISTRATION

RETREAT

PRICING OPTIONS	EARLY BIRD RATES	REGULAR RATES
MQ Partner	\$900	\$1100
Everyone Else	\$1100	\$1300

Early Bird Deadline is October 5!

[REGISTER HERE FOR MQ RETREAT!](#)

MQ Retreat Cancellation Policy

- * If you cancel **ON OR BEFORE OCTOBER 5, 2018**, you will receive a **FULL REFUND**, minus a \$100.00 processing fee.
- * If you cancel **BETWEEN OCTOBER 6, 2018–October 24, 2018** you will receive a **50% REFUND**, minus a \$100.00 processing fee.
- * **NO REFUND** will be provided for cancellation after **OCTOBER 24, 2018**.
- * **NO REFUND** will be provided to individuals who are registered but do not attend the Retreat (i.e., “No Shows”).

CELEBRATION DINNER

PRICING OPTIONS	RATES
MQ Partner	\$75
Everyone Else	\$75

[REGISTER HERE FOR DINNER!](#)