

SHARED WISDOM

A key objective of the Money Quotient Fundamentals training is to expand the participants' knowledge of the MQ materials and to increase their understanding of how to use these tools in creating a unique and purposeful client meeting process.

A Veteran MQ Partner is always in attendance to share his/her experience and insight regarding the MQ tools and processes.

The feedback we receive after each training course clearly indicates that the wisdom gleaned via contributions of veteran MQ Partners is highly valued by the participants.

**FEBRUARY
26-28 2020**

KENNEDY SCHOOL
PORTLAND, OR

"The MQ system helps the advisor bring their unique abilities and talents into play with the best of discovery tools to provide a truly enhanced financial planning experience. Both advisor and client will appreciate the end results."

- Marty Kurtz, CFP®, AIFA
The Planning Center
Moline, IL

The purpose of the "Fundamentals of Financial Life Planning" training course is to provide participants with a thorough overview of Money Quotient's unique 5-E Model for life-centered financial planning. Included in this 3-day seminar is an introduction to our philosophical foundation and the academic theories that have shaped the development of our tools and training. In addition, we provide invaluable hands-on experience with the full suite of MQ materials and facilitate important discussions regarding implementation and related practice management issues.

FUNDAMENTALS OF FINANCIAL LIFE PLANNING TRAINING SEMINAR

We conducted our first "Fundamentals of Financial Life Planning" training course in May of 2003. Since then, we have been privileged to train hundreds of individuals. Without exception, each small group session has been a rich and rewarding experience for the participants and trainers alike. In addition, our Fundamentals course continues to evolve and improve as our knowledge and understanding of "what works" grows and deepens. Likewise, the insights and experiences of our **MQ Partners** continually influence and enrich the program objectives and content.

What has become crystal clear to the MQ Team is the value and importance of the Fundamentals seminar in equipping MQ Partners with the knowledge and experience they need to successfully implement the MQ 5-E Model of Financial Life Planning.

**REGISTER OR LEARN MORE BY VISITING OUR
EVENT CALENDAR AT:**

WWW.MONEYQUOTIENT.ORG

COURSE COMPLETION BENEFITS

- Access to Silver, Gold, and Platinum Licensing Levels
- Certificate of completion
- 15 CEU credits awarded by the CFP Board
- FFLP designation added to listing on the MQ website Professional Directory (following licensing Silver, Gold, or platinum levels)
- Option to repeat "Fundamentals of Financial Life Planning" training at special discounted alumni pricing