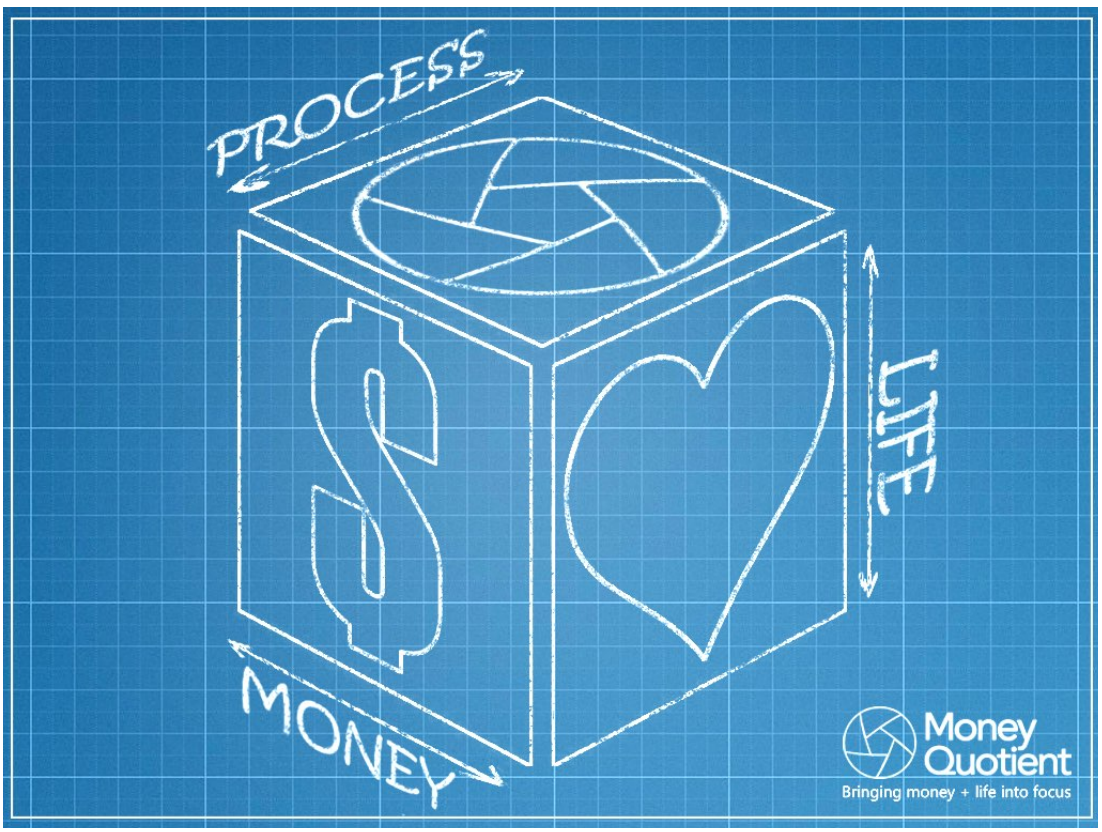
FUNDAMENTALS OF FINANCIAL LIFE PLANNING

PORTLAND, OR | DECEMBER 3 - 5, 2019

"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



EVENT: Money Quotient's "Fundamentals of Financial Life Planning" Training

DATES/TIME: Tuesday, December 3 – Thursday, December 5
8:30AM–5:00PM Each Day

LOCATION: Kennedy School | Portland, OR

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 client meeting process for delivering holistic financial planning services:

EXPLORE – Develop and strengthen trust by establishing and demonstrating the importance of understanding your clients' values and priorities.

ENGAGE – Facilitate a discovery process that will engage your clients' hearts and minds while also providing important insights regarding each person's unique frame of reference.

ENVISION – Assist your clients in developing an inspiring vision of the future that will generate enthusiasm and lay the foundation for meaningful life and financial goals.

ENLIGHTEN – Present your financial plan and advice in a way that communicates an understanding of your clients' concerns, interests, and aspirations while effectively linking financial strategies to their life goals.

EMPOWER – Utilize proven strategies for keeping your clients engaged, motivated, and on the path to achieving their life and financial goals.

This seminar also includes an introduction to our philosophical foundation and the academic theories that have shaped the development of our process, tools, and training; as well as invaluable hands-on experience with the full suite of MQ materials. In addition, we facilitate important discussions regarding implementation and related practice management issues.

"With Money Quotient, Anderson and Mullen have created something very special: a nonprofit devoted to providing advisers with tangible tools designed to elicit intangible information from clients."

- Tim Maurer, CFP® | The BAM Alliance | Mount Pleasant, SC

CREDITS

- 15.0 CEU credits have been approved for the "Fundamentals of Financial Life Planning" training seminar by the CFP Board

LEARNING OPPORTUNITIES

Participants will learn and experience the following:

- The philosophical foundation of Money Quotient: (I.Q. + E.Q. = M.Q.).
- The definition of life planning and its inextricable link to financial planning.
- The essential principles that comprise Money Quotient's unique model of Financial Life Planning.
- The practical and emotional factors that either enhance or hinder satisfaction and financial well-being.
- The roles and skills of a Financial Life Planner and how to define the boundaries for an ethical practice.
- How to integrate and custom-fit Money Quotient tools and materials into your practice.
- How to multiply the effectiveness of your discovery process.
- How to strengthen your communication skills and build meaningful, long-lasting client relationships.
- How to align financial advice with the unique set of values, priorities, and circumstances of the individuals and families that you serve.
- How to use Money Quotient materials to increase awareness, engage interest, enlighten thinking, and empower action.

"Money Quotient tools enable us to ask the right questions, allowing us to know our clients better and faster. Becoming part of the MQ Community will jump start your Financial Life Planning practice. You will learn what you need to know to help your clients live the lives they really want."

- Michelle Maton, CFP®, EA, ATA | The Planning Center | Chicago, IL

VENUE

The Kennedy School is a historic elementary school that has been turned into a unique hotel. It houses guest rooms, a restaurant, multiple small bars, a movie theater, soaking pool, gift shop, and a brewery. Extensive original artwork and historical photographs cover the walls, ceilings, doorways, and hallways.

Kennedy School | 5736 NE 33rd Avenue | Portland, OR 97211

Website | Tel: 888.249.3983 or 503.249.3983

LODGING

Guest rooms at the Kennedy School include king or queen beds as well as a private bathroom and telephone. Some rooms are fashioned from former classrooms, complete with original chalkboards and cloakrooms. Other rooms are literature-inspired, their decor reflecting themes from a specific book. All overnight guests receive complimentary use of the soaking pool and free admission to the movie theater.

To make a lodging reservation call: 888.249.3983. Be sure to request a room in the block reserved for Money Quotient. To ensure availability, room reservations must be made no later than NOVEMBER 1ST.

"By using the MQ Tools, we are telling our clients how important THEY are to us and that knowing who they are and what they care about is of paramount importance."

- Michael Kay, CFP®, CPA | Financial Focus, LLC | Livingston, NJ

SCHEDULE

The calendar below outlines the schedule for the 3-day training course:

DECEMBER 3RD	DECEMBER 4TH	DECEMBER 5TH
8:30-12:00 **Overview of Philosophical & Theoretical Foundation** **EXPLORE Stage-Part 1**	**8:30-12:00:** **ENGAGE Stage-Part 2** **ENGAGE Stage-Part 3**	**8:30-12:00** **ENLIGHTEN Stage-Part 1** **ENLIGHTEN Stage-Part 2**
12:00-1:00 Lunch	12:00-1:00 Lunch	12:00-1:00 Lunch
1:00-5:00 **EXPLORE Stage-Part 2** **ENGAGE Stage-Part 1**	**1:00-5:00** **ENVISION Stage-Part 1** **ENVISION Stage-Part 2**	**1:00-3:30:** **EMPOWER Stage-Part 1** **EMPOWER Stage-Part 2**
6:00-8:00 Optional Group Dinner	6:00-8:00 Optional Group Dinner	**3:30-5:00** **Debrief & Closing Session**

ABOUT MONEY QUOTIENT

The Mission of Money Quotient is to facilitate the exploration and implementation of a values-based, life-centered approach to financial planning.

We believe that this holistic process engages individuals and empowers them to maximize their resources and live meaningful and purposeful lives.

To this end, we conduct innovative research; provide the highest quality tools and training, and nurture a community of like-minded professionals who truly want to affect positive change in the lives of those they serve.

Financial Life Planning is a matter of broadening the conversation from asset management to life management. It is not about having all the right answers; it is about asking the right questions. Money Quotient materials and training enable you to do just that.

To learn more, please visit our website, **www.moneyquotient.org**.

"Money Quotient is at the leading edge of integrating people's lives into the quantitative world of personal finance. If we're fortunate, the future of financial planning will look like this."

-John Nelson | Co-Author of *What Color Is Your Parachute? for Retirement*

FEES AND RATES

EARLY BIRD DEADLINE IS NOVEMBER 1, 2019!!

PRICING OPTIONS	EARLY BIRD RATES	REGULAR RATES
First Time Attendee	$1350.00	$1550.00
Alumni	$675.00	$775.00

FIRST TIME ATTENDEE RATE: Applies to individuals who are **NOT** Money Quotient Partners and have **NOT** attended a Fundamentals of Financial Life Panning Training course before.

ALUMNI RATE: Applies to Money Quotient Partners who **HAVE** previously attended a Fundamentals of Financial Life Planning Training course.

★ TO REGISTER, PLEASE VISIT THE MQ WEBSITE! ★

CANCELLATION POLICY

- If you cancel **ON OR BEFORE NOVEMBER 1, 2019**, you will receive a **FULL REFUND**, minus a $100.00 processing fee.
- If you cancel **BETWEEN NOVEMBER 2, 2019—NOVEMBER 18, 2019** you will receive a **50% REFUND**, minus a $100.00 processing fee.
- **NO REFUND** will be provided for cancellation after **NOVEMBER 18, 2019**.
- **NO REFUND** will be provided to individuals who are registered but do not attend the training course (i.e., "No Shows").