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# 2020 Money Quotient Retreat

A Virtual Event — November 5 & 6

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rethink reappraise  
redefine  
reweigh  
reassess reinvestigate  
reconsider reexamine reconceive  
reexplore **REIMAGINE** revisit  
reconceptualize reenvision  
reevaluate

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Year Two and Beyond:  
*Reimagining the Purpose and  
Potential of Your Client Relationships*

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# 2020 Money Quotient Retreat

## A Virtual Event — November 5 & 6



The MQ Retreat is designed to provide a think-tank environment by exploring timely and challenging topics, and by allowing ample time for dialoguing with presenters and exploring ideas with fellow attendees.

Our guiding theme for this year's annual event is ***Year Two and Beyond: Reimagining the Purpose and Potential of Your Client Relationships.***

We love the word **REIMAGINE**: “to think about again especially in order to change or improve.” The act of “reimagining” invites us to step out of our current reality, engage in creative thinking, and to experience rewards beyond our hopes and expectations.



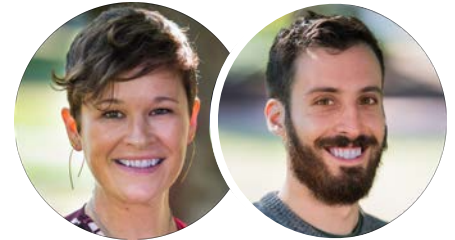
# RETREAT SESSIONS - Day 1



**Welcome & Opening Exercise**  
**Amy Mullen, CFP®**

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**“Year Two & Beyond: Issue-Driven  
Implementation & Situational Framing”**  
**Amy Mullen, CFP® & Rob Horwitz**



**“Behavioral Biases and a Multidisciplinary Approach to  
Mastering Purposeful Inquiry and Effective Client  
Engagement”**  
**Derek R. Lawson, Ph.D., CFP®**

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**“Year Two & Beyond: How I Nurture  
True Wealth™ Client Relationships”**  
**Stephen J Hazel, CFP®**  
**Paul Leighton, ChFC®**  
**Jeremy Levinn CFP**  
**Lexi Olian, CFP®**  
**Jason A. Smith CFP®**  
**Tanya Steinhofer CFA, CFP®**



**“Build It and They Will Come: Designing a Practice Grounded  
in Your Values & Vision”**  
**Maggie Kulyk, CRPC®, Chartered SRI Counselor™**

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## RETREAT SESSIONS - Day 2



**“Money Quotient, Inc & MQ Research & Education™: A Year in Review and Plans for the Future”**

**Amy Mullen, CFP®**

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**“A Values Homecoming: Directing Resources with Soulful Purpose”**

**Brenna Baucum, CFP®, Marco Vangelisti, MBA, & Jeremy Levinn, CFP®**



**“Belief Systems that Limit the Potential of Your Client Relationships”**

**Amy Mullen, CFP® Paul Leighton, ChFC®, & Johnny Roland, CFP®, EA**

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**“Intentionally Designing a Virtual Relationship: Lessons Learned from Experts in Diverse Fields”**

**Megan McCoy, Ph.D., LMFT, CFT-I™**



**“Envisioning the Future of Financial Planning & Your Potential for Changing Lives”**

**Dr. Dave Yeske, CFP®**

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# PRE-CONFERENCE ACTIVITIES

November 4th, 2020

Our 2020 MQ Retreat experience begins on November 4th with a **First-Time Attendees Orientation** from 2:00-3:30 PST / 5:00-6:30 EST.

This will be followed by a **Happy Hour Welcome Reception** from 3:30-5:00 PST / 6:30-8:00 EST. Grab your favorite beverage and take time to reconnect with old friends, welcome first timers, and prepare for the next two days of inspirational presentations and stimulating conversations.

## SCHEDULE

DAY	DATE	START	END	EVENT
Tuesday	November 4	2:00 pm PST	3:30 pm PST	<b>First-time Attendee Orientation</b>
		5:00 pm EST	6:30 pm EST	
		3:30 pm PST	5:00 pm PST	<b>Happy Hour Welcome Reception</b>
		6:30 pm EST	8:00 pm EST	
Thursday	November 5	7:30 am PST	4:00 pm PST	<b>Day 1 Program</b>
		10:30 am EST	7:00 pm EST	
		4:00 pm PST	5:30 pm PST	<b>Virtual Happy Hour</b>
		7:00 pm EST	8:30 pm EST	
Friday	November 6	7:30 am PST	4:00 pm PST	<b>Day 2 Program</b>
		10:30 am EST	7:00 pm EST	
		4:00 pm PST	5:30 pm PST	<b>Virtual Happy Hour</b>
		7:00 pm EST	8:30 pm EST	

For a detailed schedule [click here](#)

# RATES AND REGISTRATION

This two-day event is open to everyone! Take advantage of Early Bird pricing now, before registration fees increase on October 16th.

## Early Bird Deadline is October 15th!

PRICING OPTIONS	EARLY BIRD RATES	REGULAR RATES
MQ Partner	\$500	\$650
Diamond Partners	\$0	\$0
VIP Partners	\$400	\$650
Non-Profit	\$400	\$550
Full-Time Student	\$400	\$550
Others	\$700	\$850

### MQ Retreat Cancellation Policy

- \* If you cancel **ON OR BEFORE OCTOBER 16, 2020**, you will receive a **FULL REFUND**, minus a \$100.00 processing fee.
- \* If you cancel **BETWEEN OCTOBER 17, 2020 – OCTOBER 21, 2020** you will receive a 50% REFUND, minus a \$100.00 processing fee.
- \* **NO REFUND** will be provided for cancellation after **OCTOBER 21, 2020**.
- \* **NO REFUND** will be provided to individuals who are registered but do not attend the Retreat (i.e., “No Shows”).

[REGISTER HERE FOR MQ RETREAT!](#)