

2020 MQ Retreat Schedule

Wednesday, November 4

Time	Session	Activity	Host
2:00-3:30 PST 5:00-6:30 EST		First Time Attendees Orientation	Amy Mullen, CFP®
3:30-5:00 PST 6:30-8:00 EST		Virtual Happy Hour Reception	Amy Mullen, CFP®

Thursday, November 5

Time	Session	Activity	Presenter
7:30-8:30 PST 10:30-11:30 EST	0	Welcome & Opening Session	Amy Mullen, CFP®
8:30-8:45 PST 11:30-11:45 EST		Break - 15 min	
8:45-10:00 PST 11:45 -1:00 EST	1	“Year Two & Beyond: Issue-Driven Implementation & Situational Framing” <i>1.5 CFP CE pending acceptance of CFP Board</i>	Amy Mullen, CFP® & Rob Horwitz
10:00-10:15 PST 1:00 -1:15 EST		Break - 15 min	
10:15-12:00 PST 1:15-3:00 EST	2	“Behavioral Biases and a Multidisciplinary Approach to Mastering Purposeful Inquiry and Effective Client Engagement” <i>2.0 CFP CE accepted by CFP Board</i>	Derek R.Lawson, Ph.D., CFP®
12:00-12:30 PST 3:00-3:30 EST		Break - 30 min	
12:30-2:00 PST 3:30-5:00 EST	3	“Year Two & Beyond: How I Nurture True Wealth™ Client Relationships”	MQ Advisory Board Members
2:00-2:15 PST 5:00-5:15 EST		Break - 15 min	
2:15-3:30 PST 5:15-6:30 EST	4	“Build It and They Will Come: Designing a Practice Grounded in Your Values & Vision”	Maggie Kulyk, CRPC®, Chartered SRI Counselor™
3:30-4:00 PST 6:30-7:00 EST		Harvest & Evaluations	
4:00-5:30 PST 7:00-8:30 EST		Virtual Happy Hour!!	

Friday, November 6

Time	Session	Session	Presenter
7:30-8:20 PST 10:30-11:20 EST	5	Welcome & Overview of Day 2 “Money Quotient, Inc & MQ Research & Education™: A Year in Review and Plans for the Future”	Amy Mullen, CFP®
8:20-8:30 PST 11:20-11:30 EST		Break - 10 min	
8:30-10:00 PST 11:30-1:00 EST	6	“A Values Homecoming: Directing Resources with Soulful Purpose”	Brenna Baucum, CFP® Jeremy Levinn, CFP® Marco Vangelisti, MBA
10:00-10:15 PST 1:00-1:15 EST		Break - 15 min	
10:15-12:00 PST 1:15-3:00 EST	7	“Belief Systems that Limit the Potential of Your Client Relationships” <i>2.0 CFP CE pending acceptance of CFP Board</i>	Amy Mullen, CFP® Paul Leighton, ChFC® Johnny Roland, CFP®, EA
12:00-12:30 PST 3:00-3:30 EST		Break - 30 min	
12:30-2:00 PST 3:30-5:00 EST	8	“Intentionally Designing a Virtual Relationship: Lessons Learned from Experts in Diverse Fields” <i>1.5 CFP CE accepted by CFP Board</i>	Megan McCoy, Ph.D., LMFT, CFT-ITM
2:00-2:15 PST 5:00-5:15 EST		Break - 15 min	
2:15-3:30 PST 5:15-6:30 EST	9	“Envisioning the Future of Financial Planning & Your Potential for Changing Lives” <i>1.5 CFP CE pending acceptance of CFP Board</i>	Dr. Dave Yeske, CFP®
3:30-4:00 PST 6:30-7:00 EST		Harvest & Evaluations	
4:00-5:30 PST 7:00-8:30 EST		Virtual Happy Hour!!	