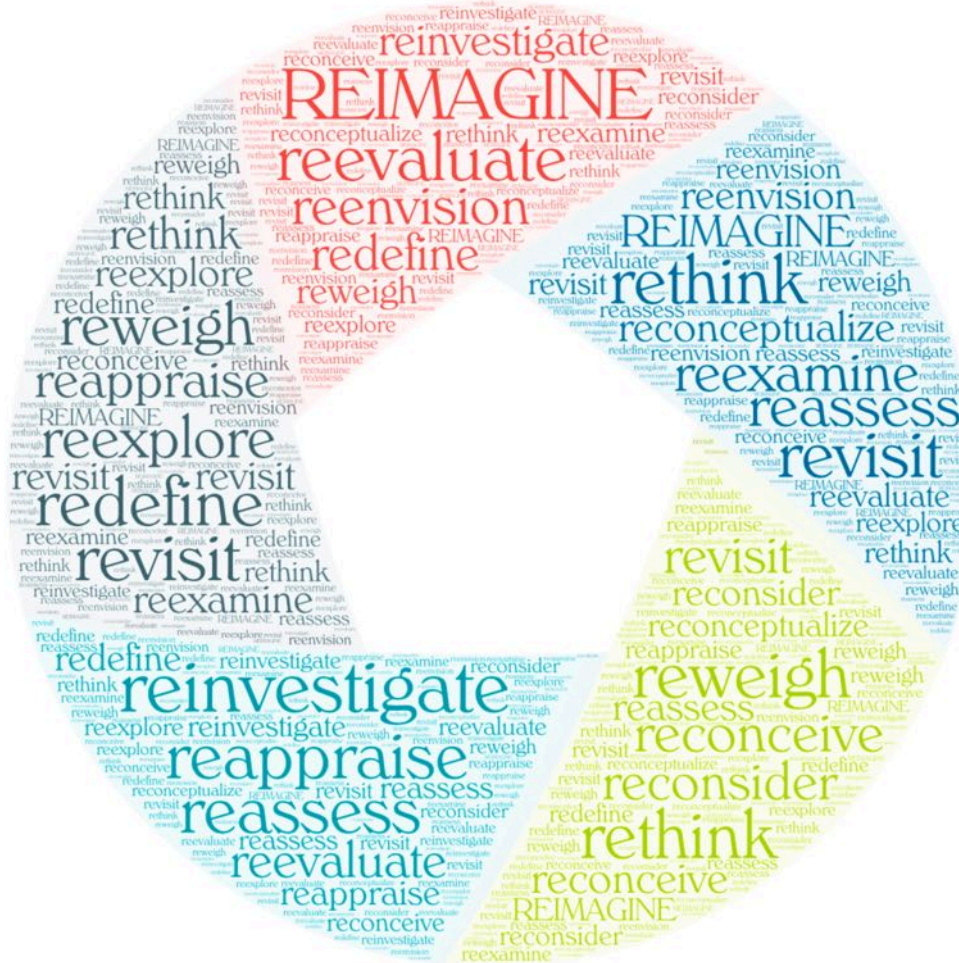


2021 Money Quotient Gathering

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



“Inspiration is not garnered from the litanies of what may befall us: it resides in humanity’s willingness to restore, redress, reform, rebuild, recover, reimagine and reconsider.”

Paul Hawken

Nov 3 - 5 | Virtual Event

2021 Money Quotient Gathering

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November 3 - 5, 2021



ABOUT THE MQ GATHERING

How are you approaching financial planning discussions and nurturing your client relationships beyond the first year? In general, the profession has limited the focal points of long-term relationships to monitoring, reporting, and recommending updates to the financial plan. We believe there is potential for so much more!

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

During the MQ Gathering, join us in exploring the **belief systems** ingrained in the profession that cause obstacles and limitations to expand the value we provide to our clients.

Do clients prefer to keep financial discussions private, or would they be interested in connecting, forming a community, and learning from others' experiences? Do clients feel an urgency to have all the answers immediately, or would they prefer a more relaxed pace to process options before deciding on a path?

In addition, we will identify the **challenges** of our current business models and brainstorm innovative ideas for future **opportunities**.

What are the ways that our revenue models are limiting our flexibility? How does the traditional one-on-one meeting format limit options and availability to provide value in other ways? Is there an opportunity to remove the pressure to "prove worth" in an ongoing client relationship?

THE STAGES OF THE MQ GATHERING



The MQ Gathering is a truly unique event based on facilitated group interaction and exploration. We break down the time together into four distinct stages that create a glide path through deeper thinking and conversations, to innovative thoughts and ideas, and to practical solutions and actions. Each stage has a distinct purpose with a set of objectives that the group

will work together to fulfill. Different models, frameworks, and participatory processes will be introduced along the way to help the group to expand into more creative thinking and to be efficient, focused, and productive. Below are the four stages and a list of the characteristics and objectives of each:

1) Arrival. Becoming Present. Feeling Shared Purpose.

Establish community and create belonging.

Letting go of busy lives and distractions to be present and do focused work

Build comfort for deeper conversations

Recognize wealth of knowledge and experience of each individual

Establish shared purpose

2) Digging in. Deepening the Conversation. Fleshing it Out.

Exploring the many assumptions, questions, and beliefs of the topic at hand

Share experiences, thoughts, and ideas related to issue

Document scattered questions, concerns, and aspirations

Identify external and internal obstacles and opportunities

Begin to connect related elements of discussions

3) Processing. Listening to Self. Thinking it Through.

Reflect back on conversations and learning that has been experienced

Identify where discussions moved from conceptual to practical

Recognize how your own opinions, beliefs, and perspectives have changed

Document personal thoughts and ideas that have surfaced

Explore internal obstacles that may exist

4) Identifying Resources. Organizing Priorities. Creating Action.

Identify specific topics or issues that require further action

Establish and organize important points that have been discussed thus far

Explore how action could be taken on macro and micro levels

Discuss who is responsible for moving the issue forward

Create an action plan with immediate next steps

Source: Adapted from Art of Hosting training by Tenneson Woolf (www.tennesonwoolf.com)

HOW THE MQ GATHERING WORKS

The MQ Gathering is an opportunity to tap into the infinite reservoir of expert knowledge and innovative thinking synonymous with the MQ Community.

In this unique and powerful think-tank environment, participants will collaborate to determine the most important topics to explore.

These top issues will become the main focus for participants to study, discuss, and define action steps toward resolution.

By utilizing an open framework, proven process, and facilitated group discussions, we will work together to:

1. Uncover the belief systems, challenges and opportunities around ongoing client relationships and transform your practice to do your best work.
2. Expand and deepen the conversation on relevant issues by allowing all participants to pose questions, share experiences, provide resources, and propose ideas.
3. Isolate and preserve the most crucial points of the discussions and develop concrete action steps that apply to your practice.

Come prepared to work hard, drill down to the real issues and uncover practical solutions. Learn from your peers and share your knowledge and experience.



MEET AND GREET

November 2, 2021 ~ 3 pm - 5 pm (PST)

Our 2021 MQ Gathering experience begins with a virtual Meet and Greet reception on November 2. Pour your favorite beverage and join us. This is an excellent opportunity to reconnect with old friends, welcome first-timers, and prepare for the following three days of stimulating conversations.

SCHEDULE

DAY	DATE	START (PST)	END (PST)	EVENT
Tuesday	November 2	3:00 pm	5:00 pm	Meet and Greet
Wednesday	November 3	9:00 am	10:15 am	Gather - Arrival
		10:15 am	10:30 am	Break
		10:30 am	12:00 pm	Gather - Digging in
		12:00 pm	12:30 pm	Break
		12:30 pm	2:00 pm	Gather - Digging in
		2:00 pm	4:00 pm	Happy Hour
Thursday	November 4	9:00 am	10:15 am	Gather - Digging in
		10:15 am	10:30 am	Break
		10:30 am	12:00 pm	Gather - Processing
		12:00 pm	12:30 pm	Break
		12:30 pm	2:00 pm	Gather - Processing
Friday	November 5	9:00 am	10:15 am	Gather - Processing
		10:15 am	10:30 am	Break
		10:30 am	12:00 pm	Gather - Creating Action
		12:00 pm	12:30 pm	Break
		12:30 pm	2:00 pm	Gather - Creating Action
		2:00 pm	4:00 pm	Happy Hour

RATES AND REGISTRATION

MQ GATHERING

PRICING OPTIONS	EARLY BIRD RATES	REGULAR RATES
MQ Partner	\$500	\$700
MQ VIP Partner	\$400	\$560
All Others	\$700	\$900

The early bird deadline ends October 8
The final deadline to register is October 15

MQ Gathering Cancellation Policy

- * If you cancel **ON OR BEFORE OCTOBER 15, 2021**, you will receive a **FULL REFUND**, minus a \$100.00 processing fee.
- * If you cancel **BETWEEN OCTOBER 16, 2021 – October 25, 2021**, you will receive a **50% REFUND**, minus a \$100.00 processing fee.
- * **NO REFUND** will be provided for cancellation after **OCTOBER 25, 2021**.
- * **NO REFUND** will be provided to individuals who are registered but do not attend the Retreat (i.e., “No Shows”).

[CLICK HERE TO REGISTER!](#)