



## MQ Fundamentals of True Wealth™ Planning

Virtual Training | June 8 - 14, 2022

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### About the Training

The MQ Fundamentals of True Wealth™ Planning training is a prerequisite for licensing Money Quotient materials. The training will give you a comprehensive overview of the tools and resources we offer and a clear understanding of the multidisciplinary, research-based approach at the foundation of our process.

Once you complete the training, you will be eligible to license as an MQ Partner. Check out our **MQ Tools At-A-Glance** resource to learn more about our licensing options and the tools/benefits of each.

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### Training Schedule

**Wednesday, June 8 - Tuesday, June 14**

**9:00 am - 1:30 pm PT / 12:00 pm - 4:30 pm ET**

(There will be no class on Saturday or Sunday)

#### Daily Agenda:

9:00am-10:30am PT	<b>Session 1</b>
10:30am-10:45am PT	<b>Break</b>
10:45am-12:00pm PT	<b>Session 2</b>
12:00pm-12:15pm PT	<b>Break</b>
12:15pm-1:30pm PT	<b>Session 3</b>

Please clear your calendar for the duration of the training. While the daily schedule is just 4.5 hours of instructional time, the content is rich, and time is needed to absorb the material and rest your mind before reconvening.

*"What could have felt like a long time in front of a computer went by really quickly. The passion and excitement behind the material was also infectious. **The only thing I'd do differently is follow their recommendation to not plan other work that week. I wish I had left myself more time to digest the material and not feel like I was trying to 'catch up' after each day's sessions.**" - Fundamentals Graduate*

Participants will receive access to the MQ Classroom two weeks before the training to complete the required pre-work and introduce themselves to other participants.

You will also receive a training binder shortly before the training begins. Many participants find it helpful to take notes throughout the training and use it as a reference manual once they license.

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## Attendee Requirements

We are thoughtful about our processes, and we work hard to create a rich learning experience. These requirements allow us to facilitate the best possible learning environment. Your engagement is crucially important, both for you and the other attendees.

- Complete the assigned pre-work.
- Participate in a "tech walk-through."
- Show up 10 minutes before the live stream of each day.
- We require the use of webcams throughout the training.
- Return from breaks promptly. You'll be working very closely with a partner during the training, and your absence will affect your partner's experience as well as your own.
- Remove all distractions (phone alerts, email notifications, etc.)
- Be present and engaged in the entirety of the training.
- Compliance with these requirements will earn participants 24 CFP® CE Credits.

*"Hands down, this is the best online training I've ever participated in. I felt very engaged throughout the week and the structure, delivery, and pacing of the material was well designed. Also, the combination of large and small group discussion along with paired partner work really help me digest the material from multiple perspectives." - Fundamentals Graduate*

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## Registration Fees and Deadlines

### **Early Bird Registration (through April 10, 2022):**

- First Time Attendee: \$2,200
- Alumni Attendee: \$1,100
- NAPFA Member: \$1,980

## April 11 - May 20, 2022

- First Time Attendee: \$2,400
- Alumni Attendee: \$1,200
- NAPFA Member: \$2,160

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## Cancellation Policy

By registering for this training, you agree to the following policies:

- If you cancel **on or before April 11, 2022**, you will receive a **full refund, minus a \$100.00 processing fee.**
- If you cancel **between April 12, 2022 - May 20, 2022**, you will receive a **50% refund, minus a \$100.00 processing fee.**
- **No refund** will be provided for cancellation **after May 20, 2022.**
- **No refund** will be provided to individuals who are registered but do not attend the MQ "Fundamentals" Training (i.e., "no shows").

Any cancellation, at any time, by a registrant who has received a training binder or other training materials is responsible for returning the materials to Money Quotient at their own cost. Money Quotient will refund the cost according to the above schedule once the materials are returned.

## After the Training

Implementing MQ In Your Practice | *Summer 2022 Graduates*

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## Implementation Consultation Program

Throughout your training experience, you will be exposed to the entire suite of MQ tools and resources and understand the differences in partnership levels. If you choose to license with us after the training, you will receive ongoing support through our Implementation Consultation Program. This support consists of MQ Study Teams, Group Communication Workshops, and an online curriculum.

This course will require you to commit approximately **three hours a week** to build your ideal client experience. **This program will lead participants to a fully implemented True Wealth™ Planning process in three months.** See the syllabus to follow for more information.



# MQ Implementation Consultation Program Syllabus

## Instructors

Amy Mullen  
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## MQ Consultants

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## Course Overview

The Implementation Consultation Program (ICP) will support MQ Partners as they incorporate Money Quotient tools and resources in their unique practice.

Through the classroom curriculum, MQ Study Team meetings, and Group Communication Workshops, MQ Partners will have the opportunity to build their ideal client experience.

## Time Requirement

The course requires a 2–3-hour time commitment per week for three months. We recommend you block time on your calendar to commit to this program for prescheduled meetings and the self-study curriculum. You can find rough time estimates for each week on the second page of this syllabus.

## Group Communication Workshop Schedule

The Group Communication Workshops will provide opportunities to practice facilitating conversation with the tools and highlight effective communication techniques. Each takes place from 10:00 am – 11:30 am PT, 1:00 pm – 2:30 pm ET.

#1 - August 3

#2 - August 17

#3 - August 31

#4 - September 14 (Gold and Platinum only)

#5 - September 28

#6 - October 12 (Gold and Platinum only)

## MQ Study Team Meeting Schedule

Participants will build their client experience with the support of a consistent study team made up of 3-6 participants, led by an MQ Consultant. Your MQ Study Team will meet either Tuesday or Thursday from 10:00 am – 11:30 am PT, 1:00 pm – 2:30 pm ET, beginning the week of July 11. You will have the option to choose which day works best for you when you sign your licensing documents.

## Course Schedule

<b>Week</b>	<b>Coursework</b>	<b>Meetings</b>
Week 1 (June 26 - July 2)	Intro: ICP Curriculum (30 min)	Orientation (1 hr)
Week 2 (July 3 - 9)	Intro: Setting the Stage (1.5 hrs)	
Week 3 (July 10 - 16)	Intro: Learning from Others (1 hr)	MQ Study team (1.5 hrs)
Week 4 (July 17 - 23)	Explore – Annual Update Pt 1 (1.5 hrs)	
Week 5 (July 24 - 30)	Explore – Annual Update Pt 2 (1 hr)	MQ Study team (1.5 hrs)
Week 6 (July 31 - August 6)	Explore – Prospects Pt 1 (1.5 hrs)	Group Communication Workshop (1.5 hrs)
Week 7 (August 7 - 13)	Explore – Prospects Pt 2 (1 hr)	MQ Study team (1.5 hrs)
Week 8 (August 14 - 20)	Engage Pt 1 (1.75 hr)	Group Communication Workshop (1.5 hrs)
Week 9 (August 21 - 27)	Engage Pt 2 (.75 hr)	MQ Study team (1.5 hrs)
Week 10 (August 28 - Sept. 3)	Envision Pt 1 (1.75 hrs)	Group Communication Workshop (1.5 hrs)
Week 11 (September 4 - 10)	Envision Pt 2 (.75 hr)	MQ Study team (1.5 hrs – Gold/Platinum only)
Week 12 (September 11 - 17)	Enlighten Pt 1 (1.75 hrs)	Group Communication Workshop (1.5 hrs – Gold/Platinum only)
Week 13 (September 18 - 24)	Enlighten Pt 2 (.75 hr)	MQ Study team (1.5 hrs)
Week 14 (Sept. 25 - Oct. 1)	Empower Stage Pt 1 (1.25 hrs)	Group Communication Workshop (1.5 hrs)
Week 15 (October 2 - 8)	Empower Stage Pt 2 (1.5 hrs)	MQ Study team (1.5 hrs – Gold/Platinum only)
Week 16 (October 9 - 15)	Closing Items (1 hr)	Group Communication Workshop (1.5 hrs – Gold/Platinum only)

*You will also have access to 1:1 meeting(s) with your MQ Consultant.*

*Silver and Gold = one 1:1 meeting, Platinum = 3 1:1 meeting.*

*You can book these at any time throughout the course.*