



MQ Fundamentals of True Wealth™ Planning Portland, OR | September 12 - 14, 2022

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.

Training Schedule

Monday, September 12 - Wednesday, September 14
8:30 am - 5:00 pm PT

8:30 am - 10:00 am	Session 1
10:00 am - 10:15 am	Break
10:15 am - 12:00 pm	Session 2
12:00 pm - 1:00 pm	Lunch
1:00 pm - 2:15 pm	Session 3
2:15 pm - 2:25 pm	Break
2:25 pm - 3:35 pm	Session 4
3:35 pm - 3:45 pm	Break
3:45 pm - 4:45 pm	Session 5
4:45 pm - 5:00 pm	Harvest & Evaluations

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.
- Come prepared and well-rested.
- 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 sessions.
- Compliance with these requirements will earn participants 24 CFP CE Credits.

Venue & Lodging

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

Guest rooms at the Kennedy School include king or queen beds and a private bathroom. 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.

You can call the Kennedy School or book online to make a reservation.

- Call 888.249.3983. Be sure to request a room in the block reserved for Money Quotient.
- **Book online** and use the code **2209MONEYQ**. Be sure to select "**Kennedy School**" in the top left menu, and choose "**GROUP/BLOCK**" under "Special Codes." Room reservations must be made no later than Friday, August 12.

Kennedy School | [Website](#) | 5736 NE 33rd Avenue | Portland, OR 97211
Tel: 888.249.3983 or 503.249.3983

"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

Registration Fees and Deadlines

Early Bird Registration (through July 11, 2022):

- First Time Attendee: \$2,400
- Alumni Attendee: \$1,200
- NAPFA or Nazrudin Members: \$2,160

July 11 - August 26, 2022

- First Time Attendee: \$2,600
 - Alumni Attendee: \$1,300
 - NAPFA or Nazrudin Members: \$2,340
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Cancellation Policy

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

- If you cancel **on or before July 11, 2022**, you will receive a **full refund, minus a \$100.00 processing fee**.
 - If you cancel **between July 12, 2022 - August 26, 2022**, you will receive a **50% refund, minus a \$100.00 processing fee**.
 - **No refund** will be provided for cancellation **after August 26, 2022**.
 - **No refund** will be provided to individuals who are registered but do not attend the MQ "Fundamentals" Training (i.e., "no shows").
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After the Training

Implementing MQ In Your Practice | *September 2022 Graduates*

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

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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 - November 23 #2 - December 7

#3 - December 21 #4 - January 11 (Gold and Platinum only)

#5 - January 26 #6 - February 8 (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 October 30. You will have the option to choose which day works best for you when you sign your licensing documents.

Course Schedule

Week	Coursework	Meetings
Week 1 (October 16 - 22)	Intro: ICP Curriculum (30 min)	Orientation (1 hr)
Week 2 (October 23 - 29)	Intro: Setting the Stage (1.5 hrs)	
Week 3 (Oct. 30 - Nov. 5)	Intro: Learning from Others (1 hr)	MQ Study team (1.5 hrs)
Week 4 (November 6 - 12)	Explore – Annual Update Pt 1 (1.5 hrs)	
Week 5 (November 13 - 19)	Explore – Annual Update Pt 2 (1 hr)	MQ Study team (1.5 hrs)
Week 6 (November 20 - 26)	Explore – Prospects Pt 1 (1.5 hrs)	Group Communication Workshop (1.5 hrs)
Week 7 (Nov. 27 - Dec. 3)	Explore – Prospects Pt 2 (1 hr)	MQ Study team (1.5 hrs)
Week 8 (December 4 - 10)	Engage Pt 1 (1.75 hr)	Group Communication Workshop (1.5 hrs)
Week 9 (December 11 - 17)	Engage Pt 2 (.75 hr)	MQ Study team (1.5 hrs)
Week 10 (December 18 - 24)	Envision Pt 1 (1.75 hrs)	Group Communication Workshop (1.5 hrs)
Week 11 (December 25 - 31)	Happy Holidays!	
Week 12 (January 1 - 7)	Envision Pt 2 (.75 hr)	MQ Study team (1.5 hrs – Gold/Platinum only)
Week 13 (January 8 - 14)	Enlighten Pt 1 (1.75 hrs)	Group Communication Workshop (1.5 hrs – Gold/Platinum only)
Week 14 (January 15 - 21)	Enlighten Pt 2 (.75 hr)	MQ Study team (1.5 hrs)
Week 15 (January 22 - 28)	Empower Stage Pt 1 (1.25 hrs)	Group Communication Workshop (1.5 hrs)
Week 16 (Jan. 29 - Feb. 4)	Empower Stage Pt 2 (1.5 hrs)	MQ Study team (1.5 hrs – Gold/Platinum only)
Week 17 (February 5 - 11)	Closing Items (1 hr)	Group Communication Workshop (1.5 hrs – Gold/Platinum only)

You will also have access to one-to-one (1:1) meeting(s) with your MQ Consultant. Silver and Gold = one 1:1 meeting, Platinum = 3 1:1 meetings. You can book these at any time throughout the course.