



MQ Fundamentals of True Wealth™ Planning Virtual Training | June 7 - 13, 2023

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

Wednesday, June 7 - 13, 2023

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	Session 1
10:30am-10:45am PT	Break
10:45am-12:00pm PT	Session 2
12:00pm-12:15pm PT	Break
12:15pm-1:30pm PT	Session 3

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.

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

Registration Fees and Deadlines

Early Bird Registration (through April 26, 2023):

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

April 27 - May 19, 2023:

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

Cancellation Policy

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

- If you cancel **on or before April 27, 2023**, you will receive a **full refund, minus a \$100.00 processing fee**.
- If you cancel **between April 28 - May 19, 2023**, you will receive a **50% refund, minus a \$100.00 processing fee**.
- **No refund** will be provided for cancellation **after May 19, 2023**.
- **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 2023 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 – August 2	#2 – August 16
#3 – August 30	#4 – Sept. 13 (Gold and Platinum only)
#5 – September 27	#6 – Oct. 11 (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 March 27. 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 (June 25 – July 1)	Intro: ICP Curriculum (30 min)	Orientation (1 hr)
Week 2 (July 2 – 8)	Intro: Setting the Stage (1.5 hrs)	
Week 3 (July 9 – 15)	Intro: Learning from Others (1 hr)	MQ Study team (1.5 hrs)
Week 4 (July 16 – 22)	Explore – Annual Update Pt 1 (1.5 hrs)	
Week 5 (July 23 – 29)	Explore – Annual Update Pt 2 (1 hr)	MQ Study team (1.5 hrs)
Week 6 (July 30 – August 5)	Explore – Prospects Pt 1 (1.5 hrs)	Group Communication Workshop (1.5 hrs)
Week 7 (August 6 – 12)	Explore – Prospects Pt 2 (1 hr)	MQ Study team (1.5 hrs)
Week 8 (August 13 – 19)	Engage Pt 1 (1.75 hr)	Group Communication Workshop (1.5 hrs)
Week 9 (August 20 – 26)	Engage Pt 2 (.75 hr)	MQ Study team (1.5 hrs)
Week 10 (August 27 – Sept. 2)	Envision Pt 1 (1.75 hrs)	Group Communication Workshop (1.5 hrs)
Week 11 (September 3 – 9)	Envision Pt 2 (.75 hr)	MQ Study team (1.5 hrs – Gold/Platinum only)
Week 12 (September 10 – 16)	Enlighten Pt 1 (1.75 hrs)	Group Communication Workshop (1.5 hrs – Gold/Platinum only)
Week 13 (September 17 – 23)	Enlighten Pt 2 (.75 hr)	MQ Study team (1.5 hrs)
Week 14 (September 24 – 30)	Empower Stage Pt 1 (1.25 hrs)	Group Communication Workshop (1.5 hrs)
Week 15 (October 1 – 7)	Empower Stage Pt 2 (1.5 hrs)	MQ Study team (1.5 hrs – Gold/Platinum only)
Week 16 (October 8 – 14)	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.