
2022 Money Quotient Retreat

Portland, OR | October 25-27 | JupiterNEXT



NURTURING RESILIENT & REWARDING
CLIENT RELATIONSHIPS IN A RAPIDLY
CHANGING ENVIRONMENT

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October 25-27, 2022



ABOUT THE RETREAT

The MQ Research Consortium recently updated a 15-year-old study to explore how demographic shifts, economic uncertainties, environmental threats, political transitions, global unrest, and a worldwide pandemic have forever altered the needs and expectations of financial planning clients. The key question explored was, “Have the factors that foster higher levels of client trust and commitment changed over time?” At the 2022 MQ Retreat, lead researchers Carol Anderson, M.S., and Deanna Sharpe, Ph.D., will present the results and discuss the implications of this groundbreaking study.

In addition, notable scholars and practitioners will use this information as a springboard for sharing insights and knowledge that will equip you to meet current challenges and to serve as beacons in the lives of your clients for many years to come:

- **Amy Mullen, CFP®**, - President of Money Quotient, Inc.
- **Carol Anderson, M.S.** - President of MQ Research & Education
- **Timi Joy Jorgenson, Ph.D.** – Assistant Professor and Director of Financial Education & Well-Being at American College
- **Meghaan Lurtz, Ph.D., CFP®, FBS™** – Lecturer; Writer and Senior Research Associate, kitces.com
- **Deanna L. Sharpe, Ph.D., CFP®, CRPC®, CRPS®** – Associate Professor and Director of CFP Board-Registered Program, University of Missouri
- **MQ Implementation Program Consultants**
- **MQ Advisory Board Members**

FEATURED SPEAKERS

Timi Joy Jorgensen, Ph.D.

Timi Joy Jorgensen, Ph.D., is an Assistant Professor and Director of Financial Education & Well-Being at The American College of Financial Services. She joined the faculty in June 2020 after completing a six-month fellowship with The College.



Timi's research focuses on diversity, equity, and inclusion in financial services and financial well-being and empowerment. She has been a speaker, panelist, and contributor on the topic of creating a more inclusive and empowering financial services profession. She has spoken at conferences, on radio shows, and to several hundred couples and single parents at financial literacy courses. She is passionate about making financial planning a more approachable and empowering topic available to all American households.

Timi graduated with a bachelor's degree in personal financial planning from Utah Valley University in 2014 and completed her graduate studies in financial planning in Spring 2020 from the University of Georgia.

Meghaan Lurtz, Ph.D., CFP®, FBS™

Meghaan Lurtz, Ph.D., FBS™ is a Professor of Practice at Kansas State University, where she teaches courses for the Advanced Financial Planning Certificate Program, a lecturer at Columbia University, where she teaches Financial Psychology, and an on-staff writer and researcher of financial psychology at Kitces.com. Her research interests vary as she studies both practitioners of financial planning as well as financial planning and financial therapy practices and interventions. Her research and expertise have been featured in the Journal of Financial Planning, Journal of Consumer Affairs, Financial Planning Review, Wall Street Journal, BBC, Million Dollar Roundtable, and New York Magazine. She has also contributed chapters to the CFP Board's textbook, Client Psychology. Meghaan is a past President and current board member for the Financial Therapy Association and Financial Psychology Institute Europe.



Deanna Sharpe, Ph.D., CFP®, CRPC®, CRPS

Deanna is an associate professor in the Personal Financial Planning Department at the University of Missouri. Her research examines factors affecting later life financial and economic well-being. Work on Expenditures in Grandparent-Headed Households and the Financial Issues of Having a Child with Autism won Outstanding Paper awards.



Deanna has provided professional service to the Certified Financial Planner Board of Standards, Inc., the Association of Financial Counseling and Planning Educators, and the American Council on Consumer Interests. She is on the editorial board of the Journal of Family and Economic Issues, the Journal of Financial Planning and Counseling, and the Pertanika Journal of Social Sciences and Humanities.

ABOUT THE VENUE



This year's event will be held at the **JupiterNEXT Hotel** on the east side of the Willamette River in Portland's Kerns neighborhood.

Money Quotient has reserved a block of rooms at the hotel for attendees. Please use **this link** to reserve your room. (You will not need to enter a discount code as long as you use this link.) The final date to register and book your hotel room at this discounted rate is **October 4**.

Extended Stays

If you would like to stay additional days at the hotel, please book the MQ Retreat dates through the link above, then call the hotel at **503-234-7767** to extend your visit. You will need your booking confirmation code.

MEET AND GREET

October 25, 2022 ~ 6:00 pm - 9:00 pm

Our 2022 MQ Retreat experience begins with a Meet and Greet reception the evening of October 25th. This event is included in your registration for the MQ Retreat.

Join us at **Hey Love**, a lush tropical bar & restaurant located in the lobby of the JupiterNEXT hotel. Money Quotient will provide snacks and a meeting area, and guests may order drinks and other food items at the bar or with our servers.



We will be gathering for casual drinks and conversation. This will be a great opportunity to recharge after a day of traveling in a relaxed and congenial setting. Take time to reconnect with old friends, welcome first timers, and prepare for the next two days of inspirational presentations and stimulating conversations.

CELEBRATION DINNER

October 26 ~ 6:00 pm - 9:00 pm

Our annual Celebration Dinner will take place in the same location as our MQ Retreat. Appetizers, a buffet dinner, and two drink tickets are included in the price of your MQ Retreat registration. A cash bar will be available for additional beverages.

Schedule of events:

5:00 pm - 6:00 pm: The MQ Retreat concludes, leaving attendees time to return to their rooms for a moment of rest and to freshen up.

6:00 pm - 7:00 pm: MQ hosts an hour-long cocktail hour, featuring drinks and hors d'oeuvres.

7:00 pm - 9:00 pm: Hey Love caters our buffet dinner. The menu will include gluten-free and vegetarian options.

Please let us know if you have allergies or dietary restrictions by **contacting us**, and we will do our best to accommodate your needs.

SCHEDULE

DAY	DATE	START	END	EVENT
Tuesday	October 25	6:00 pm	9:00 pm	Meet and Greet
Wednesday	October 26	7:30 am	8:30 am	Breakfast
		8:30 am	12:00 Noon	Retreat
		12:00 Noon	1:00 pm	Lunch
		1:00 pm	5:00 pm	Retreat
		5:00 pm	6:00 pm	Happy Hour
		6:00 pm	9:00 pm	Celebration Dinner
Thursday	October 27	7:30 am	8:30 am	Breakfast
		8:30 am	12:00 Noon	Retreat
		12:00 Noon	1:00 pm	Lunch
		1:00 pm	5:00 pm	Retreat
		5:00 pm	6:30 pm	Happy Hour

RATES AND REGISTRATION

EARLY BIRD RATES	REGULAR RATES
\$1200	\$1400

Early bird registration ends September 13, 2022.

The final deadline to register is October 11, 2022.

Retreat Cancellation Policy

- * If you cancel **ON OR BEFORE SEPTEMBER 27, 2022**, you will receive a **FULL REFUND**, minus a \$100.00 processing fee.
- * If you cancel **BETWEEN SEPTEMBER 28 – OCTOBER 11, 2022** you will receive a **50% REFUND**, minus a \$100.00 processing fee.
- * **NO REFUND** will be provided for cancellation after **OCTOBER 11, 2022**.
- * **NO REFUND** will be provided to individuals who are registered but do not attend the Retreat (i.e., “No Shows”).

[REGISTER](#)

ABOUT THE AREA

Located in the state's northwest area, near the Washington-Oregon border, Portland is smaller and more laid-back than its nearest metropolitan neighbor, Seattle. It celebrates eco-friendliness, equal rights, art, music, independent business, outdoor activities, food, coffee, and - especially - beer and wine.



The Willamette River divides Portland into east and west districts. A main thoroughfare running north and south divides the city further, resulting in six "quadrants" - Southwest, Southeast, Northwest, North, Northeast, and East - each with its own neighborhoods, restaurants, bars, pubs, parks, and shops brimming with the unique flavor and flair of their quadrant.

Portland is filled with greenery and boasts an abundance of urban parks. Forest Park is the largest wilderness park within city limits in the United States, covering more than 5,000 acres. Clear days in Portland offer views of both Mt. Hood and Mt. St. Helens and the opportunity to take a stroll along the Willamette River.

Tourism

Portland offers tourism activities for a wide variety of tastes. In most areas, you will find ample independent small businesses and eateries. If you like biking, hiking, or otherwise enjoying the outdoors, Portland has a vast park system and several trails. Thanks to an extensive public transit system that includes light rail and a streetcar, getting around Portland is easy. Visiting without renting a car is easy to do if you plan to stay in the city.

Selected highlights include:

- **Powell's City of Books**, covers an entire city block and contains more than 1.5 million books in 3,500 different sections.
- **Lan Su Chinese Garden**, an authentically built Ming Dynasty-style garden.
- **The Hollywood Theatre**, is Portland's premier modern-historic movie house.
- **Movie Madness**, an unrivaled film rental shop, and screen-used prop museum.
- The **Portlandia Sculpture**, is the second-largest hammered copper statue in the United States, after the Statue of Liberty.
- The **Portland Art Museum**, is the oldest museum in the Northwest.
- Visit **TravelPortland.com** for additional tourism information.