

# MQ RETREAT 2022

## Session Descriptions

**Carol Anderson, M.S.,  
President - MQ Research & Education**

### ***Do Factors that Foster Client Trust and Commitment Evolve Over Time?***

The 2006 “Survey of Specific Elements of Communication that Affect Trust and Commitment in the Financial Planning Process” provided empirical support for the critical role that “life planning” communication plays in developing successful planner-client relationships. However, in the 15 years since that research was conducted, several significant economic events and social changes have occurred with broad implications for financial planning engagements. In 2021, the MQ Research Consortium replicated the original study to gain new insights regarding the factors critical to developing and preserving client trust and commitment in an ever-changing environment.

**James Hindes, MBA.**

### ***The Art and Science of Virtual Meetings***

James Hindes of ENOW Financial runs a 100% virtual practice, with meetings that successfully incorporates the Money Quotient tools into the client experience. James will discuss both the Art and Science of running a successful virtual meeting that incorporates both EQ and IQ. In this session you will learn:

1. The pros, cons, and myths of virtual meetings
2. How to "read the room" when you're not in the room
3. The benefits of narrating the obvious, asking permission, and pausing to take notes
4. How to leverage Money Quotient's web-based forms and tools for client engagement
5. How to tailor your physical environment for a successful virtual meeting
6. The importance of financial planning visualizations tailored for screens

**Timi Joy Jorgensen, Ph.D.**  
**Assistant Professor and Director of Financial Education & Well-Being at American College**

***Improving Client Relationships and Outcomes through the Inclusive Financial Wellbeing and Empowerment Model***

Learn how individual identity shapes the way we think, feel, behave, and interact with our financial world. Dive into detailed findings that can unlock structural, behavioral, and cultural barriers your clients face in achieving financial health. Explore tools and techniques to navigate the planner / client relationship and create more meaningful engagement with your clients.

**Meghaan R. Lurtz, PhD, FBS®**  
**Senior Research Associate, CE Manager, and writer**  
**for [www.kitces.com](http://www.kitces.com)**

***Financial Stress & Anxiety: Keeping Yourself & Clients Mentally Healthy***

In today's digital-age culture where nearly all sources of news and media are instantly accessible and information overload is a normal state of being, it is not surprising that stress and anxiety are very commonly experienced in our fast-paced society. And in fact, stress and anxiety about specific financial problems are what most often drive people to seek the help of an advisor in the first place! Which, in turn, means that advisors should have some strategies in their toolbelts to effectively help clients (prospective or otherwise) who might be stressed and anxious. Accordingly, the first step is understanding that, while the terms "stress" and "anxiety" are often used interchangeably, the reality is that they are two very different things, indeed, and require different approaches. In this presentation you will learn how to work though stress and anxiety, and even discuss when the issue goes beyond financial planning how to talk to clients about getting other types of professional help.

## **Learning Objectives:**

1. Identify the connection between money and our emotions.
2. Define stress and define anxiety – they are different and here is how you can tell.
3. Identify strategies for working with clients experiencing stress.
4. Identify strategies for working with clients experiencing anxiety.
5. Understand how stress and anxiety impacts advisors and client relationships.
6. Identify strategies for how to get clients help when their needs go beyond financial planning services.

**Amy Mullen, CFP®**

**Coming soon**

coming soon

**Deanna L. Sharpe, Ph.D., CFP®, CRPC®, CRPS®  
Associate Professor and Director of CFP Board-Registered  
Program, University of Missouri**

***Financial Planning Conversations in Challenging and Changing  
Times***

Helping clients navigate change is an important objective of financial planning. But what if change has a profound effect on the profession itself? The recent covid crisis and growing demand for cultural competence calls for review of evidence-based best practices in light of these challenges. Specifically, in what ways and to what extent do client financial anxiety, virtual meeting navigation, and cultural awareness shape financial planning conversations and development of client trust and commitment?