



MQ Fundamentals of True Wealth™ Planning Virtual Training | February 26-28 & March 3-4

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

February 26-28 & March 3-4

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 January 10, 2025):

- First Time Attendee: \$2,200
- Alumni Attendee: \$1,430

January 11 - January 24 (International) or January 31 (USA):

- First Time Attendee: \$2,400
- Alumni Attendee: \$1,560

Cancellation Policy

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

- If you cancel **on or before January 10, 2025**, you will receive a **full refund, minus a \$100.00 processing fee**.
- If you cancel **between January 11, 2025 - January 31, 2025**, you will receive a **50% refund, minus a \$100.00 processing fee**.
- **No refund** will be provided for cancellation **after January 31, 2025**.
- **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 | Feb/March 2025 Graduates

Implementation 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 Program. This support consists of MQ Study Teams, Group Communication Workshops, and an online curriculum.

This course will require you to commit approximately **two to three hours per 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 Program Syllabus

Instructors

Amy Mullen, CFP®
amy@moneyquotient.com

MQ Consultant(s)

To Be Determined

Course Overview

The MQ Implementation Program supports MQ Partners as they incorporate Money Quotient tools in their practice. Through the classroom curriculum, Group Communication Workshops, MQ Study Team, and client meetings, participants will have the opportunity to hone their skills with MQ Tools.

Time Commitment

The course requires a 2–3-hour time commitment per week for four 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 Workshops

The Group Communication Workshops will provide opportunities to practice facilitating conversation with the tools and highlight effective communication techniques. Each takes place on Wednesday at **10:00 am PT / 1:00pm ET** and lasts 90-minutes.

#1 – April 9

#2 – April 23

#3 – May 7

#4 – May 21 (Gold and Platinum only)

#5 – June 4

#6 – June 18 (Gold and Platinum only)

MQ Study Teams

Participants will build their client experience with the support of a consistent study team made up of 3-8 participants, led by an MQ Consultant. **Your MQ Study Team will meet on either Thursdays or Fridays (details TBD) at 10:00 am PT / 1:00 pm ET** and lasts 90-minutes.

Client Meetings

Participants will be responsible for identifying and scheduling at least one individual (client, friend, or fellow cohort member) to walk through the True Wealth Process over four bi-weekly meetings. They will then share their experience with their MQ Study Team.

Course Schedule

| Week | Coursework | Meetings |
|--------------------------------|-------------------------------------------|----------------------------------------------------------------|
| Week 1 (March 16 - 22) | Intro: ICP Curriculum (30 min) | Orientation (1 hr) |
| Week 2 (March 23 - 29) | Intro: Setting the Stage (1.5 hrs) | |
| Week 3 (March 30 – April 5) | Intro: Learning from Others (1 hr) | MQ Study team (1.5 hrs) |
| Week 4 (April 6 - 11) | Explore – Annual Update Pt 1 (1.5 hrs) | Group Communication Workshop (1.5 hrs) |
| Week 5 (April 12 - 18) | Explore – Annual Update Pt 2 (1 hr) | MQ Study team (1.5 hrs) |
| Week 6 (April 19 - 26) | Explore – Prospects Pt 1 (1.5 hrs) | Group Communication Workshop (1.5 hrs) |
| Week 7 (April 27 – May 3) | Explore – Prospects Pt 2 (1 hr) | MQ Study team (1.5 hrs) |
| Week 8 (May 4 - 10) | Engage Pt 1 (1.75 hr) | Group Communication Workshop (1.5 hrs) |
| Week 9 (May 11 - 17) | Engage Pt 2 (.75 hr) | MQ Study team (1.5 hrs) |
| Week 10 (May 18 – 24) | Envision Pt 1 (1.75 hrs) | Group Communication Workshop (1.5 hrs – Gold/Platinum only) |
| Week 11 (May 26 – 31) | Envision Pt 2 (.75 hr) | MQ Study team (1.5 hrs – Gold/Platinum only) |
| Week 12 (June 1 – 7) | Enlighten Pt 1 (1.75 hrs) | Group Communication Workshop (1.5 hrs) |
| Week 13 (June 8 – 14) | Enlighten Pt 2 (.75 hr) | MQ Study team (1.5 hrs) |
| Week 14 (June 15 – 21) | Empower Stage Pt 1 (1.25 hrs) | Group Communication Workshop (1.5 hrs – Gold/Platinum only) |
| Week 15 (June 22 - 28) | Empower Stage Pt 2 (1.5 hrs) | MQ Study team (1.5 hrs – Gold/Platinum only) |
| Week 16 (June 29 – July 5) | Closing Items (1 hr) | |

*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.*