



# MQ Fundamentals of True Wealth™ Planning

Tucson, AZ | January 21 - 23, 2025

Cambridge Financial Group | 6700 N Oracle Road, Suite 324

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## 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.

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## Training Schedule

Tuesday, January 21 - Thursday, January 23, 2025

8:30 am - 5:00 pm PT

### Daily Agenda:

8:30 am – 10:00 am	Session 1
10:00 am – 10:15 am PT	Break
10:15 am – 12:00 pm PT	Session 2
12:00 pm – 1:00 pm PT	Lunch
1:00 pm – 2:15 pm PT	Session 3
2:15 pm – 2:25 pm PT	Break
2:25 pm – 3:35 pm PT	Session 4
3:35 pm – 3:45 pm PT	Break
3:45 pm – 4:45 pm PT	Session 5
4:45 pm – 5:00 pm PT	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
- Show up 10 minutes before the live stream of each day.
- 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.

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## Venue and Lodging

All participants are responsible for arranging their own transportation and lodging. These are NOT covered with the cost of attending the Fundamentals of True Wealth™ Planning training course.

The training will take place in the **Cambridge Financial Group office (6700 N Oracle Road, Suite 324, Tucson, AZ)**, which features plentiful parking in an on-site lot.

The most convenient **airports** servicing the Tucson area are:

- **[Tucson International Airport](#)**
- **[Phoenix Sky Harbor International Airport](#)** – Phoenix is approximately 120 miles from Tucson.
- **[Glendale Regional Airport](#)** – Featuring a smaller airport, Glendale is approximately 140 miles from Tucson.

Nearby **hotels** include (but are not limited to):

- **[Westward Look – Wyndham Grand Resort & Spa](#)** (~1.8 miles from the training location)
- **[3 Palms Tucson – A Marigold Hotel](#)** (~1.2 mi)

- [Best Western InnSuites](#) (~0.7 mi)
- [Towne Place Suites by Marriott](#) (~1.0 mi)
- [Lo Posada Lodge & Casitas](#) (~1.1 mi)

*"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*

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## Registration Fees and Deadlines

**Registration closes Monday, January 6**

Registration fee: **\$1500 for all students** (First Time Attendees and MQ Alumni)

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## Cancellation Policy

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

- If you cancel **on or before Friday, December 13**, you will receive a **full refund, minus a \$100.00 processing fee.**
- If you cancel **between December 14, 2024 - January 6, 2025** you will receive a **50% refund, minus a \$100.00 processing fee.**
- **No refund** will be provided for cancellation **after January 6, 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 | *January 2025 Graduates*

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## 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 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

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## Instructors

Amy Mullen, CFP®  
[amy@moneyquotient.com](mailto: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

<b>Week</b>	<b>Coursework</b>	<b>Meetings</b>
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.*