

# Money Quotient®

Putting Money in the Context of Life™

## SHARED WISDOM

A key objective of the Money Quotient Fundamentals training is to expand the participants' knowledge of the M.Q. materials and to increase their understanding of how to use these tools in creating a unique and purposeful client meeting process.

A Veteran M.Q. Licensee is always in attendance to share his/her experience and insight regarding the M.Q. tools and processes.

The feedback we receive after each training course clearly indicates that the wisdom gleaned via contributions of veteran M.Q. Licensees is highly valued by the participants.

**December 7-9  
2016**

**KENNEDY SCHOOL  
PORTLAND, OR**

"The M.Q. system helps the advisor bring their unique abilities and talents into play with the best of discovery tools to provide a truly enhanced financial planning experience. Both advisor and client will appreciate the end results."

- Marty Kurtz, CFP®, AIFA  
The Planning Center  
Moline, IL

The purpose of the "Fundamentals of Financial Life Planning" training course is to provide participants with a thorough overview of Money Quotient's unique 5-E Model for life-centered financial planning. Included in this 3-day seminar is an introduction to our philosophical foundation and the academic theories that have shaped the development of our tools and training. In addition, we provide invaluable hands-on experience with the full suite of M.Q. materials and facilitate important discussions regarding implementation and related practice management issues.

## FUNDAMENTALS OF FINANCIAL LIFE PLANNING TRAINING SEMINAR

We conducted our first "Fundamentals of Financial Life Planning" training course in May of 2003. Since then, we have been privileged to train hundreds of individuals. Without exception, each small group session has been a rich and rewarding experience for the participants and trainers alike. In addition, our Fundamentals course continues to evolve and improve as our knowledge and understanding of "what works" grows and deepens. Likewise, the insights and experiences of our Licensees continually influence and enrich the program objectives and content.

What has become crystal clear to the M.Q. Team is the value and importance of the Fundamentals seminar in equipping M.Q. Licensees with the knowledge and experience they need to successfully implement the M.Q. 5-E Model of Financial Life Planning.

**REGISTER OR LEARN MORE BY VISITING OUR  
EVENT CALENDAR AT:**

**[WWW.MONEYQUOTIENT.ORG](http://WWW.MONEYQUOTIENT.ORG)**

## COURSE COMPLETION BENEFITS

- Access to Licensing Levels 2 through 4
- Certificate of completion
- 15 CEU credits pending approval by the CFP Board
- FFLP designation added to listing on M.Q. website Professional Directory (after licensing Level 2 or higher)
- Option to repeat "Fundamentals of Financial Life Planning" training at special discounted alumni pricing