

## 2010 Money Quotient Retreat & Special Post-Conference Advanced Training



### **Purpose and Process:** **Designing Your Client Relationships** November 8-9, 2010

The guiding theme for our 2010 M.Q. Retreat will be **focusing our intentions and strengthening our systems** to provide the very best in life-centered financial planning advice, service, and education. Learn and contribute in a think tank atmosphere while you experience the inspiring and mutually supportive environment of the M.Q. Community. To whet your appetite, see descriptions below of just a few of the informative and inspiring sessions we have planned!!

### Sampling of Retreat Sessions

#### Mastering Ideal Client Relationships: The Essential Formula

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**Tracy Beckes, MBA** is a nationally recognized business coach and thought leader in the area of practice management. She helps financial advisors to master effortless productivity by cultivating their natural abilities, simplifying their lives, and implementing the mechanics of *true value creation*. In this session, Tracy will demonstrate how to master a simple, yet elegant formula for client selection and firm management that unleashes the hidden potential in your firm and will positively influence your revenue, your staff, your personal life, and your future success.

## Applying the Tools of the Masters: A Life Planner's Search for the "Killer App" of Life Planning

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In this workshop, **Rick Kahler, CFP®, MS, ChFC, CCIM** will share from his own journey and experience. He will discuss and analyze a variety of exercises, forms, and techniques being touted today by the best Life Planners. Learn which ones he chooses to use in his own practice and why. Rick will also describe how he has customized the M.Q. client meeting templates, integrated additional exercises and methodologies with M.Q. tools and processes, and leveraged technology to simplify his life planning process and differentiate his practice.

## Journey into Elderhood: Helping Clients Prepare for Later Life with Meaning and Purpose

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Longer life spans increase the likelihood that your clients will live beyond their capacity to sustain an independent lifestyle. This is not just a financial problem; it is a physical, psychological, and cultural problem as well. Therefore, a key objective of the M.Q. life planning approach is to help individuals and families make successful life transitions through all ages and stages of life. In this groundbreaking session, **Ben Coombs, CFP®** and **Carol Anderson, M.S.** team up to promote a holistic approach for thinking about and preparing for old age. They will introduce new tools, techniques, and resources to help your clients reframe the aging process and to focus on ways they can "live richly" until the day they die.

## Life Planning & Cash Flow Management: Tools for Surviving and Thriving in all Market Conditions

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In a period of unprecedented market volatility, incompetence, fraud, and abuse, Americans are looking for real solutions for real problems. Therefore, help your clients to focus on what is truly most important to them and provide tools that will allow them to survive and thrive in all market conditions. In this session, **Marty Kurtz, CFP®** and **Amy Mullen** will demonstrate how to integrate user-friendly systems that link life planning and cash flow management processes. In addition, learn how to engage your clients in meaningful financial planning conversations and empower them to affect positive change in their lives.

## What Else to Expect at this Retreat



- ❖ A beautiful setting for experiencing the richness of the M.Q. Community
- ❖ An update on the future of Money Quotient
- ❖ Innovative tools and strategies you can immediately put to use

- ❖ More time built into each session for interaction with session presenters and to discuss key points with your colleagues
- ❖ New insights and knowledge that will broaden and deepen your concept of Financial Life Planning, strengthen your skills, and contribute to your personal and professional success
- ❖ An in-depth learning experience that will offer lasting value for you, your practice, and your clients
- ❖ Inspiring atmosphere for visualizing and strategizing your future
- ❖ A warm and welcoming environment for reconnecting with old friends and establishing new relationships that matter
- ❖ Evening gatherings for good food, fun, and fellowship
- ❖ Wonderful sightseeing opportunities convenient to the Retreat venue

## Overview of Advanced Training

# *Principles of Client Communication & Discovery*

**November 10-11, 2010**

**Please note:** *The Advanced Training session and the M.Q. Retreat are separate events. You may participate in Advanced Training without attending the Retreat. However, the session is open only to M.Q. Licensees who have completed the “Fundamentals of Financial Life Planning” training course.*

Immediately following the M.Q. Retreat, we will be introducing a powerful two-day training co-developed and co-facilitated by Carol Anderson, M.S. and William “Marty” Martin, Psy.D. This unique M.Q. Learning Opportunity is designed specifically for M.Q. Licensees who have completed our “Fundamentals of Financial Life Planning” Training and are **seeking additional skills, insight, and mastery** in regard to client communication and discovery.

- ❖ Learn the “interpretive approach” to understanding client responses to M.Q. tools
- ❖ Adopt a framework of key psychological principles that will quickly give you insight regarding your clients’ perceptions, values, attitudes, and beliefs
- ❖ Master simple strategies for facilitating meaningful conversation and ongoing discovery using M.Q. tools as a starting point
- ❖ Learn coaching techniques that will guide your clients in making positive change
- ❖ Identify and capture key information gathered in your life planning process



## REGISTRATION FORM

### 2010 Money Quotient® Retreat

**"Purpose and Process: Designing Your Client Relationships"**  
**Monday, November 8<sup>th</sup> and Tuesday, November 9<sup>th</sup>**

### Post-Retreat Advanced Training Session

**"Principles of Client Communication and Discovery"**  
**Wednesday, November 10<sup>th</sup> and Thursday, November 11<sup>th</sup>**

**Clearwater Resort and Conference Center  
 Suquamish, Washington**

The M.Q. Retreat program fee you pay will be determined by the date we receive your registration form and non-refundable deposit of \$150. **Register by Aug. 27<sup>th</sup> and receive the Early Bird Discount.**

A two-day Advanced Training session will follow the Retreat. This session is open to M.Q. Licensees who have completed the "Fundamentals of Financial Life Planning" Training, and will be facilitated by Carol Anderson, M.S. and William "Marty" Martin, Psy.D.

#### Step 1: November 8<sup>th</sup> & 9<sup>th</sup> Retreat Program Fees

Category	Registration Deadlines	M.Q. Licensee	Non-Licensee
<b>Early Bird Discount</b>	<b>\$150 deposit must be received by August 27<sup>th</sup></b>	<b>\$800</b>	<b>\$1,000</b>
Regular	<b>Deposits received between August 28<sup>th</sup>-September 27<sup>th</sup></b> <i>After September 27<sup>th</sup> all registration fees must be paid in full</i>	\$1,000	\$1,200
Total \$ _____			

#### Step 2: November 10<sup>th</sup> & 11<sup>th</sup> Advanced Training

Category	Registration Deadline	M.Q. Licensee*	
<b>Early Bird Discount</b>	<b>\$150 deposit must be received by August 27<sup>th</sup></b>	<b>\$800</b>	* This session is open only to M.Q. Licensees who have completed "Fundamentals of Financial Life Planning" Training.
Regular	<b>Deposits received between August 28<sup>th</sup>-September 27<sup>th</sup></b> <i>After September 27<sup>th</sup> all registration fees must be paid in full</i>	\$1,000	
Total \$ _____			

**Step 3: Total Amount to be Charged to my Credit Card** \$\_\_\_\_\_

**Attendee Information:**

Name/Certs: \_\_\_\_\_

Firm: \_\_\_\_\_

Street Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

E-mail: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Special Needs: \_\_\_\_\_

Dietary Restrictions \_\_\_\_\_

**Payment Options:**

- Charge the non-refundable \$150.00 deposit for the M.Q. Retreat Program to my credit card now to reserve my space *(the balance will be processed on Sept 27<sup>th</sup>).*
- Charge the non-refundable \$150.00 deposit for the M.Q. Advanced Training to my credit card now to reserve my space *(the balance will be processed on Sept 27<sup>th</sup>).*
- Charge the full amount to my credit card now.

Account Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Name on Card: \_\_\_\_\_ Security Code: \_\_\_\_\_

Billing Address for Card: \_\_\_\_\_  
Street Address Unit #

\_\_\_\_\_  
City State Zip Code

Credit Card Type:  American Express  MasterCard  Visa

Signature: \_\_\_\_\_

**Cancellation Policy:**

- ❖ **The \$150.00 deposit, for each event, is non-refundable** and will not be applied to any other M.Q. program or event.
- ❖ If canceling **on or before August 27, 2010**, a full refund will be given, minus the \$150.00 deposit.
- ❖ If canceling between **August 28, 2010 and September 27, 2010**, a 50% refund will be given, minus the \$150.00 deposit.
- ❖ No refund will be given if canceling after **September 27, 2010 or to “no shows.”**

## Other Info:

- ❖ Clearwater Resort is located 6 miles west of the Bainbridge Island ferry terminal, directions and transportation options will be provided when you register.
- ❖ Plan to arrive Sunday, November 7<sup>th</sup> and join us from 7:00 to 10:00 p.m. in our hospitality Suite, the Carver Room, for socializing and refreshments.
- ❖ The M.Q. Retreat will officially begin with an opening session at 8:00 a.m. on Monday, November 8<sup>th</sup> and end on Tuesday evening, November 9<sup>th</sup> at 5:00 p.m.
- ❖ The Post-Retreat Advanced Training session is scheduled for Wednesday, November 10<sup>th</sup> and Thursday, November 11<sup>th</sup> from 9:00 a.m. to 5:00 p.m.
- ❖ The program fee includes lunch and refreshment breaks for both days. Overnight lodging and dinners are not included in the program fee.
- ❖ Please see the "lodging" section below for more information about making your room reservations at the Resort.
- ❖ Watch for information about the opening night celebration dinner that will be available soon!

## Lodging:

To make lodging arrangements, please contact the Clearwater Resort directly. M.Q. has reserved a block of rooms at the Resort at a discounted rate. In order to receive the block room rate, **you must** advise the reservation desk that you will be attending the Money Quotient Retreat. Reservations must be made via telephone. The discounted rate will not be available for reservations made online. **These rooms are available—on a first-come first-served basis—until October 18<sup>th</sup>. We highly recommend that you reserve your room as soon as possible to take advantage of the discounted room rate.**

**Clearwater Resort Contact Information: 866.609.8700 or 360.598.8700. For information about the Resort, visit their website: [www.clearwatercasino.com/accommodations/](http://www.clearwatercasino.com/accommodations/)**

**Please submit completed registration form to M.Q. via:**

**Fax: 888.842.8435**

**E-mail: [learning@moneyquotient.org](mailto:learning@moneyquotient.org)**

**Questions? Please contact Money Quotient at:**

**Telephone: 360.697.4561**

**E-mail: [learning@moneyquotient.org](mailto:learning@moneyquotient.org)**

**We are happy to have you join us!!**