



Fundamentals of Financial Life Planning® Training Seminar

“By using the M.Q. Tools, we are telling our clients how important THEY are to us and that knowing who they are and what they care about is of paramount importance.”

-Michael Kay, CFP®, CPA, *Financial Focus, LLC*

Event Information

EVENT: MONEY QUOTIENT “FUNDAMENTALS OF FINANCIAL LIFE PLANNING”
TRAINING COURSE

DATES: Wednesday, August 18, 2010
Thursday, August 19, 2010
Friday, August 20, 2010

LOCATION: Financial Focus, LLC
70 South Orange Ave, Suite 245
Livingston, NJ 07039-4903

Michael Kay, CFP®, CPA—President of Financial Focus and Chairman of the M.Q. Licensee Advisory Board—has invited Money Quotient to his office suite to conduct our first 3-day training on the East Coast. Please join us!!



“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*

Credits

- ❖ 17.0 CEU approved by CFP® Board of Standards
- ❖ 17.0 CEU approved for PACE

Learning Opportunities

Participants will learn and experience the following:



FFLP in Session

- ❖ The philosophical foundation of Money Quotient (I.Q. + E.Q. = M.Q.)
- ❖ The definition of life planning and its inextricable link to financial planning
- ❖ The essential principles that comprise M.Q.'s unique model of Financial Life Planning

- ❖ The practical and emotional factors that either enhance or hinder satisfaction and financial well-being
- ❖ The roles and skills of a Financial Life Planner and how to define the boundaries for an ethical practice
- ❖ How to integrate and custom-fit M.Q. tools and materials into your practice
- ❖ How to multiply the effectiveness of your discovery process
- ❖ How to strengthen your communication skills and build meaningful, long-lasting client relationships.



Discussing Financial Life Planning

- ❖ How to align financial advice with the unique set of values, priorities, and circumstances of the individuals and families that you serve
- ❖ How to use Money Quotient materials to increase awareness, engage interest, enlighten thinking, and empower action

“Money Quotient tools enable us to ask the right questions, allowing us to know our clients better and faster. Becoming part of the M.Q. Community will jump start your Financial Life Planning® practice. You will learn what you need to know to help your clients live the lives they really want.”

-Michelle Maton, CFP®, EA, ATA, Aequus Wealth Management Resources

Schedule

The calendar below outlines the schedule for the 3-day training course:

AUGUST 18-20, 2010

18

8:30-12:00 Overview of Philosophical & Theoretical Foundation

12:00-1:00 Lunch

1:00-5:00 Practice Tool Review & Practical Application, Part 1

6:00-8:00 Optional Group Dinner

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8:30-12:00 Practice Tool Review & Practical Application, Part 2

12:00-1:00 Lunch

1:00-5:00 Practice Tool Review & Practical Application, Part 3

6:00-8:00 Optional Group Dinner

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8:30-10:00 “Measure Your M.Q.” and “Raise Your M.Q.”

10:00-12:00 Case Study Part 1

12:00-1:00 Lunch

1:00-3:30 Case Study Part 2

3:30-5:00 Debriefing and Closing Session

Training Location

The session will be held at the offices of Financial Focus, LLC in Livingston, New Jersey. Livingston is located in the northeastern part of New Jersey, 26 miles southwest of New York City.

Transportation and Lodging Suggestions

The nearest airport to the training location is the Newark Liberty International Airport located in Newark, New Jersey. Livingston is located approximately eight miles northwest of Newark. Major domestic airlines servicing Newark include Alaska, American, Continental, Delta, Jet Blue, United, US Airways, and Virgin. [Newark Airport Website Link](#)

Car rental is suggested as the easiest mode of transportation from Newark to Livingston. A selection of area hotels are listed below:

Westminster Hotel

550 West Mt. Pleasant Avenue
Livingston, NJ 07039

[Website Link](#) Tel: 973.533.0600
Price Range: \$166.00-\$180.00

Courtyard Marriot—Hanover Whippany

157 Route 10 East
Whippany, NJ 07981

[Website Link](#) Tel: 973.887.8700
Price Range: \$159.00-\$214.00

Best Western Turtle Brook Inn

555 Northfield Avenue
West Orange, NJ 07052

[Website Link](#) Tel: 973.731.5300
Price Range: \$95.00-\$139.00

Ramada Conference Center East Hanover/Parsippany

130 Route 10 West
East Hanover, NJ 07936

[Website Link](#) Tel: 973.386.5622
Price Range: \$95.00-\$205.00

“The M.Q. process is a powerful, time-tested, and easy to execute methodology that will take your financial practice to the next level.”

-Rick Kahler, M.S., CFP®, Kahler Financial Group

Registration Fees & Rates

A non-refundable deposit of \$150.00 will reserve your space. The balance of the training fee will be due July 21, 2010. **All deposits are non-refundable and non-transferable to other training dates.**

- ❖ **LICENSEE RATE:** \$1,200—Applies to Money Quotient Licensees who have **NOT** previously attended a Fundamentals of Financial Life Planning Training course.
- ❖ **M.Q. ALUMNI RATE:** \$600—Applies to Money Quotient Licensees who **HAVE** previously attended a Fundamentals of Financial Life Planning Training course.
- ❖ **OTHER RATE:** \$1,500—Applies to individuals who are **NOT** Money Quotient Licensees. Those who choose to license within 30 days of attending the training course will receive a credit of \$300.00 toward licensing fees.

Cancellation Policy

- ❖ If you cancel **ON OR BEFORE JULY 21, 2010**, you will receive a **FULL REFUND**, minus the \$150.00 deposit.
- ❖ If you cancel **BETWEEN JULY 22, 2010—AUGUST 4, 2010**, you will receive a **50% REFUND**, minus the \$150.00 deposit.
- ❖ **NO REFUND** will be provided for cancellation after **AUGUST 4, 2010**.
- ❖ **NO REFUND** will be provided to individuals who are registered but do not attend the training course (ie: “No Shows”).

❖ PLEASE SEE THE FOLLOWING PAGE FOR REGISTRATION FORM AND INSTRUCTIONS ❖



FFLP Class of August 2009

August 18-20, 2010 FFLP Registration Form

Personal Information

NAME: _____
First *Last*

COMPANY: _____

ADDRESS: _____
Street Address *Suite #*

_____ *City* *State* *Zip Code*

PHONE: () _____ FAX: () _____

E-MAIL: _____

Training Registration

Please indicate appropriate rate below:

RATES	\$ AMOUNT
M.Q. Licensee Rate—\$1,200	
M.Q. Alumni Rate—\$600	
Other Rate—\$1,500	
Total*	

*All training fees are in U.S. dollars

Payment Options

Please select a payment option below:

Charge the non-refundable \$150.00 deposit to my credit card now to reserve my space. **I understand that the remainder of the training fee will be processed to my credit card July 21, 2010.**

Charge the full amount to my credit card

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: _____

I authorize Money Quotient to keep my credit card information on file for future use

Submit Registration Via:

Fax: 888.842.8435 ❖ **E-mail:** learning@moneyquotient.org ❖ **Phone:** 360.697.4561