

The KINDER INSTITUTE
of LIFE PLANNING

*Leaders in training financial
professionals in client communications*

5-Day Life Planning Training

- Event Location:** Gaunts House: 44 (0) 1202-841522
<http://www.gaunthouse.com/joomla/index.php>
Wimborne, Dorset, BH21 4JQ, UK
- Event Preparation:** Refer to the Preparation page 2 of this document.
- Schedule of Events:**
- Please see the general agenda in this documents for a more detailed schedule
 - Participants are expected to share all meals together
 - Typically there are one or two evenings of group work or facilitation and a couple of evenings of working with your life planning partner.
- Accommodations:** Please let us know whether you would prefer single or double occupancy. Room/board charges are £77 per night for single occupancy, and £67 per night for double occupancy, per person, if available. The non-residential day rate is £44 per person. Please email Maryellen Grady at Maryellen.Grady@kinderinstitute.com with your preference. The Kinder Institute will make all room arrangements. If you have provided a credit card your room charges will be billed to that card, otherwise an invoice will be emailed.
- Meals:** Meals are included.
- Dietary Needs:** Please advise us of allergies or special dietary needs; we will make every effort to accommodate you.
- Driving Directions:** Gaunts is found on 2000 private acres, three miles north of Wimborne. Twenty min from Ringwood and Poole, 30 min from Bournemouth and Christchurch, 45 min from Dorchester, Salisbury and Southampton.
http://www.gaunthouse.com/joomla/index.php?option=com_content&task=view&id=19&Itemid=44
- Airports:** **Airports** London Heathrow or Gatwick; Southampton; Bournemouth; Exeter; Bristol.
- Transportation:**
- By train:** London Waterloo, Bristol Temple Meads & all stations to Bournemouth or Poole.
- By coach:** London Victoria & Hammersmith, Heathrow, & most cities to B'mouth or Poole.
- By bus:** from Bournemouth or Poole nos.132 and 133 to WIMBORNE, then taxi.
- Local taxis:** 01202 888888 and 01202 884444 (approx. £20 from B'mouth; £18 from Poole; £5 from Wimborne).

PREPARATION

5-Day Life Planning Training

In preparation for the 5-Day please complete as much as possible from the list below:

- Read George's textbook on Life Planning called **Lighting the Torch**
- Re-read **Seven Stages of Money Maturity**; or, if you're pressed for time, focus particularly on Chapter 7 "Understanding: The Deep Heart's Core".
- Think about and write down answers to the "Goal" exercises in Chapter 6 of **Seven Stages of Money Maturity**. This includes the "Heart's Core" and "Goals For Your Life" grids. - *Link below*
- Prepare answers to "The 3 Questions". - *Link below*
- Complete the "Ideal Day", "Ideal Week" and "Ideal Year" grids. - *Link below*
- Please prepare a net worth statement and personal budget and bring it with you.
- Both books are available at amazon.com.

Links

Hearts Core, Goals for Your Life, 3 Questions:

www.kinderinstitute.com/grads/grad-docs/3-Questions-Hearts-Core-Goals-for-Your-Life.pdf

Ideal Day:

www.kinderinstitute.com/grads/grad-docs/ideal-typical-Day.pdf

Ideal Week/Year:

www.kinderinstitute.com/grads/grad-docs/ideal-current-W-Y.pdf

GENERAL AGENDA **5-Day Life Planning Training**

First Evening

Arrive	5:00 – 6:00	pm
Dinner	6:00	pm
Getting acquainted	7:00 – 9:00	pm

Full Days 1-4

Breakfast	7:30 – 8:15	am
Morning Session	8:15 – 12:30	pm
Lunch	12:30 – 2:00	pm
Afternoon Session	2:00 – 6:45	pm
Dinner	7:00 – 8:00	pm

Day 5 (half day)

Breakfast	7:30 – 8:15	am
Final Session & Closing	8:45 – 12:30	

Note: Most evenings there will be homework/action plans, work in pairs, or an evening session.

- *****Please dress comfortably***
- Participants are expected to share all meals together
- Typically there are one or two evenings of group work or facilitation, and a couple of evenings of working with your Life Planning partner.