

5-Day Life Planning Training

Event Location:	The Wylie Inn and Conference Center at Endicott College 295 Hale Street Beverly, MA 01915 www.wyliecenter.com
Event preparation:	Refer to the Preparation page of this document.
Registration information	http://www.kinderinstitute.com/registration.htm
Schedule of events	<ul style="list-style-type: none"> • Please plan to arrive in time to check in and join the group at 5pm for a meet and greet gathering. Dinner will be served at approximately 6 pm. • 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	<p>The Kinder Institute will make all room arrangements. Upon check in please provide the Wylie Center with a credit card to cover your room and board charge. Please email Maryellen Grady at Maryellen.Grady@kinderinstitute.com with any details or questions.</p> <p>For a list of amenities click here >> http://www.wyliecenter.com/inn_amenities.html</p>
Meals	Meals are included with the room charge.
Dietary needs & Allergies	Please advise us of allergies or special dietary needs; we will make every effort to accommodate you.
Driving Directions	For map and directions click here >> http://www.wyliecenter.com/map.html
Airports	Logan International Airport (BOS) in Boston, MA Manchester - Boston Regional Airport (MHT) in Manchester, NH
Transportation	<ol style="list-style-type: none"> 1. Car rental 2. Logan Express bus to Peabody and short taxi from the Logan Express terminal to the Wylie Conference Center http://www.massport.com/logan/getti_logan_peabo.html 3. Total Travel Estimates: 41 minutes / 24.04 miles from Logan International Airport (BOS), 122 Harborside Dr, East Boston, MA 02128 4. Total Travel Estimates: 1 hour 13 minutes / 60.14 miles Manchester Airport (MHT): 1 Airport Rd # 300, Manchester, NH 03103 5. Ending Location: 295 Hale St, Beverly, MA 01915-2036

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.