



# Overview of MQ Materials & Services

(Also see “Fee Structure for MQ Materials & Services”)

## About Partnership Levels

The tools, resources, and benefits included in each of the MQ Partnership Levels are shown below and through page 13. Please note that the number of tools, resources, and benefits offered in each successive Level is cumulative. In other words, each successive Level offers an increasing number of tools, resources, and benefits.

The “Sampler” package is made available on a short-term basis only (three months) to provide you the opportunity to “test drive” MQ materials and processes prior to investing in our more in-depth programs. All other partnership levels can be licensed following completion of the “Fundamentals of True Wealth™ Planning” training course (see more information about this prerequisite on page 12 of this document).

## SAMPLER LEVEL

TRUE WEALTH TOOLS & INSTRUCTIONS	PRACTICE MANAGEMENT RESOURCES	TRAINING & BENEFITS
Satisfaction & Values <ul style="list-style-type: none"> <li>• Introduction (planner &amp; client versions)</li> <li>• Financial Satisfaction Survey &amp; Tool Guide</li> </ul>	MQ True Wealth Process & Tool Design Client Meeting Schedule Template What is True Wealth Planning?	Orientation Phone Meeting Free Registration for MQ Webinars Online MQ Discussion Forum
Biography <ul style="list-style-type: none"> <li>• Introduction (planner &amp; client versions)</li> <li>• Present True Wealth &amp; Tool Guide</li> </ul>	Sample Letters Introducing True Wealth Approach <ul style="list-style-type: none"> <li>• Prospective Client Letter</li> <li>• Existing Client Letter</li> </ul>	Online MQ Learning Opportunities Recordings Archive Discounted fees for Learning Opportunities
Transitions <ul style="list-style-type: none"> <li>• Introduction (planner &amp; client versions)</li> <li>• Life Transitions Survey &amp; Tool Guide</li> </ul>	Simple Financial Statement Completing Interactive True Wealth Worksheets Tips and Strategies for Navigating True Wealth Planning Conversations	

## SILVER LEVEL: IN-DEPTH DATA GATHERING

(additional items not included in Sampler Level are shown in bold)

### TRUE WEALTH TOOLS & INSTRUCTIONS

#### Satisfaction & Values

- Introduction (planner & client versions)
- Financial Satisfaction Survey & Tool Guide
- **Business Financial Satisfaction Survey**
- **Wheel of Life & Tool Guide**
- **Wheel of My Business**

#### Biography

- Introduction (planner & client versions)
- Present Financial Life & Tool Guide
- **Financial History & Tool Guide**
- **Personal Insights about Money & Tool Guide**
- **Personal Insights from Your Career Path**

#### Transitions

- Introduction (planner & client versions)
- Life Transitions Survey & Tool Guide
- **Business Transition Survey**
- **Personal Insights about Change & Tool Guide**
- **Retirement: Thinking it Through & Tool Guide**

### PRACTICE MANAGEMENT RESOURCES

MQ True Wealth Process & Tool Design

**Client Meeting Schedule Templates (three)**

What is True Wealth Planning?

**Time Management Tactics**

**True Wealth Tools Checklist**

**True Wealth Tools Note Sheets**

**What Do You Do? Worksheet**

**My Mission, My Message Worksheet**

**True Wealth Planning Soundbites**

Tips and Strategies for Navigating True Wealth Planning Conversations

Sample Letters Introducing True Wealth Approach

- Prospective Client Letter
- Existing Client Letter

**Aligning True Wealth & 6-Step FP Processes (chart)**

**The MQ Model for True Wealth Planning**

**When SMART Goals Are Not Always Wise**

**Your True Wealth Plan Action Steps**

**General Client Information Sheet**

Simple Financial Statement

Completing Interactive True Wealth Worksheets

**True Wealth Summary Sheets**

- **Summary Sheets Guide**
- **“Business of Life” Article**
- **Key Elements for Creating Your True Wealth Plan**
- **Plan for Success**

## SILVER LEVEL: IN-DEPTH DATA GATHERING

(additional items not included in Sampler Level are shown in bold)

### TRAINING & BENEFITS

#### **Implementation Consulting Program (ICP)-(first year of MQ Partnership only)**

1. Virtual Orientation Meeting
2. **Six (6) Virtual Consultations**

#### **Ongoing (on-going following first year of MQ Partnership)**

1. **One (1) Annual Review Call**
2. Free Registration for all MQ Webinars
3. Online MQ Community Discussion Forum
4. Online MQ Education Archive
5. **True Wealth Tools Reference Manual (includes Tool Guides & Introductions)**
6. **Discounted pricing for printed versions of:**
  - “Designing Your Life in Retirement” Workbooks & related presentation materials
  - “Measure Your MQ” Self-Assessment, “Raise Your MQ” Workbook, & related presentation materials
  - “No Rules Retirement” Workbooks & related presentation materials
  - “Journey Into Elderhood” Booklet

# GOLD LEVEL: IN-DEPTH DATA GATHERING & GOAL SETTING

(additional items not included in Silver Level are shown in bold)

## TRUE WEALTH TOOLS & INSTRUCTIONS

### Satisfaction & Values

- Introduction (planner & client versions)
- Financial Satisfaction Survey & Tool Guide
- Business Financial Satisfaction Survey
- Wheel of Life & Tool Guide
- Wheel of My Business
- **Personal Insights about Life Balance & Tool Guide**
- **Personal Insights about Work/Life Balance**
- **Investing Your Time and Energy & Tool Guide**

### Biography

- Introduction (planner & client versions)
- Present Financial Life & Tool Guide
- Financial History & Tool Guide
- Personal Insights About Money & Tool Guide
- Personal Insights from Your Career Path

### Transitions

- Introduction (planner & client versions)
- Life Transitions Survey & Tool Guide

### Transitions (Continued)

- Introduction (planner & client versions)
- Life Transitions Survey & Tool Guide
- Business Transition Survey
- **Life Transitions Workbook Generator**
- **Life Transitions Worksheets (52)**
- Personal Insights about Change & Tool Guide
- Retirement: Thinking it Through & Tool Guide
- **Retirement Vision & Tool Guide**
- **My Ideal Week in Retirement & Tool Guide**

### Goals

- **Introduction (planner & client versions)**
- **Personal Insights about Planning & Goal Setting & Tool Guide**
- **Visualize Your Future & Tool Guide**
- **Visualize Your Ideal Business**
- **Goals for Life & Tool Guide**
- **Clarify Your Life Goals & Tool Guide**
- **Clarify Your Business Goals**

## PRACTICE MANAGEMENT RESOURCES

MQ True Wealth Process & Tool Design

**Client Meeting Schedule Templates (four)**

What is True Wealth Planning?

Time Management Tactics

TRUE WEALTH Tools Checklist

TRUE WEALTH Tools Note Sheets

What Do You Do? Worksheet

My Mission, My Message Worksheet

True Wealth Planning Soundbites

Tips and Strategies for Navigating TRUE WEALTH Conversations

Sample Letters Introducing TRUE WEALTH Approach

- Prospective Client Letter
- Existing Client Letter

Aligning True Wealth & 6-Step FP Processes (chart)

The MQ Model for True Wealth Planning

When SMART Goals Are Not Always Wise

Your True Wealth Plan Action Steps

General Client Information Sheet

Simple Financial Statement

Completing Interactive True Wealth Worksheets

True Wealth Summary Sheets

- Summary Sheets Guide
- "Business of Life" Article
- Key Elements for Creating Your True Wealth Plan
- Plan for Success
- **Foundation of Your True Wealth Plan**

# GOLD LEVEL: IN-DEPTH DATA GATHERING & GOAL SETTING

(additional items not included in the Silver are shown in bold)

## TRAINING & BENEFITS

### **Implementation Consulting Program (ICP)-(first year of MQ Partnership only)**

1. Virtual Orientation Meeting
2. **Nine (9) Virtual Consultations**

### **Ongoing (on-going following first year of MQ Partnership)**

1. One (1) Annual Review Call
2. Free Registration for all MQ Webinars
3. Online MQ Community Discussion Forum
4. Online MQ Education Archive
5. True Wealth Tools Reference Manual (includes Tool Guides & Introductions)
6. Discounted pricing for printed versions of:
  - “Designing Your Life in Retirement” Workbooks & related presentation materials
  - “Measure Your MQ” Self-Assessment, “Raise Your MQ” Workbook, & related presentation materials
  - “No Rules Retirement” Workbooks & related presentation materials
  - “Journey Into Elderhood” Booklet

# PLATINUM LEVEL: COMPLETE TRUE WEALTH PLANNING TOOLKIT

(additional items not included in Gold Level are shown in bold)

## TRUE WEALTH TOOLS & INSTRUCTIONS

### Satisfaction & Values

- Introduction (planner & client versions)
- Financial Satisfaction Survey & Tool Guide
- Business Financial Satisfaction Survey
- Wheel of Life & Tool Guide
- Wheel of My Business
- Personal Insights about Life Balance & Tool Guide
- Personal Insights about Work/Life Balance
- Investing Your Time and Energy & Tool Guide
- **Defining True Wealth & Tool Guide**

### Biography

- Introduction (planner & client versions)
- Present Financial Life & Tool Guide
- Financial History & Tool Guide
- Personal Insights about Money & Tool Guide
- Personal Insights from Your Career Path
- **Money Memories & Tool Guide**

### Transitions

- Introduction (planner & client versions)
- Life Transitions Survey & Tool Guide
- Business Transition Survey
- Life Transitions Workbook Generator
- Life Transitions Worksheets (52)
- Personal Insights about Change & Tool Guide
- Retirement: Thinking it Through & Tool Guide
- Retirement Vision & Tool Guide
- My Ideal Week in Retirement & Tool Guide
- **Designing Your Financial Legacy & Tool Guide**

### Goals

- Introduction (planner & client versions)
- Personal Insights about Planning & Goal Setting & Tool Guide
- Visualize Your Future & Tool Guide
- Visualize Your Ideal Business
- Goals for Life & Tool Guide
- Clarify Your Life Goals & Tool Guide
- Clarify Your Business Goals

## PRACTICE MANAGEMENT RESOURCES

MQ TRUE WEALTH Process & Tool Design

**Client Meeting Schedule Templates (five)**

What is True Wealth Planning?

Time Management Tactics

True Wealth Tools Checklist

True Wealth Tools Note Sheets

Tips and Strategies for Navigating True Wealth Planning Conversations

What Do You Do? Worksheet

My Mission, My Message Worksheet

True Wealth Planning Soundbites

Sample Letters Introducing True Wealth Approach

- Prospective Client Letter
- Existing Client Letter

Aligning True Wealth & 6-Step FP Processes (chart)

The MQ Model for True Wealth Planning

When SMART Goals Are Not Always Wise

Your True Wealth Plan Action Steps

General Client Information Sheet

Simple Financial Statement

General Client Information Sheet

Simple Financial Statement

Completing Interactive True Wealth Worksheets

True Wealth Summary Sheets

- Summary Sheets Guide
- "Business of Life" Article
- Key Elements for Creating Your True Wealth Plan
- Plan for Success
- Foundation of Your True Wealth Plan

**Raise Your MQ Workbook Note Sheets**

**Raise Your MQ Workbook Checklist**

# PLATINUM LEVEL: COMPLETE TRUE WEALTH PLANNING TOOLKIT

(additional items not included in Gold Level are shown in bold)

## ADDITIONAL MODULES

### Article Library Access

**“Measure Your MQ” Self-Assessment, “Raise Your MQ” Workbook, & related presentation materials**

**“Designing Your Life In Retirement” Workbook & related presentation materials**

**“No Rules Retirement” Workbook & related presentation materials**

**Journey Into Elderhood Workbook**

## TRAINING & BENEFITS

### Implementation Consulting Program (ICP)-(first year of MQ Partnership only)

1. Virtual Orientation Meeting
2. **Twelve (12) Virtual Consultations**

### Ongoing (on-going following first year of MQ Partnership)

1. One (1) Annual Review Call
2. **One (1) Annual Coaching Call**
3. Free Registration for all MQ Webinars
4. Online MQ Community Discussion Forum
5. Online MQ Education Archive
6. True Wealth Tools Reference Manual (includes Tool Guides & Introductions)
7. Discounted pricing for printed versions of:
  - “Designing Your Life in Retirement” Workbooks & related presentation materials
  - “Measure Your MQ” Self-Assessment, “Raise Your MQ” Workbook, & related presentation materials
  - “No Rules Retirement” Workbooks & related presentation materials
  - “Journey Into Elderhood” Booklet

# DIAMOND LEVEL: ALL INCLUSIVE TRUE WEALTH™ PLANNING PACKAGE

(additional items not included in Platinum Level are shown in bold)

## TRUE WEALTH TOOLS & INSTRUCTIONS

### Satisfaction & Values

- Introduction (planner & client versions)
- Financial Satisfaction Survey & Tool Guide
- Business Financial Satisfaction Survey
- Wheel of Life & Tool Guide
- Wheel of My Business
- Personal Insights about Life Balance & Tool Guide
- Personal Insights about Work/Life Balance
- Investing Your Time and Energy & Tool Guide
- Defining True Wealth & Tool Guide

### Biography

- Introduction (planner & client versions)
- Present Financial Life & Tool Guide
- Financial History & Tool Guide
- Personal Insights about Money & Tool Guide
- Personal Insights from Your Career Path
- Money Memories & Tool Guide

### Transitions

- Introduction (planner & client versions)
- Life Transitions Survey & Tool Guide
- Business Transition Survey
- Life Transitions Workbook Generator
- Life Transitions Worksheets (52)
- Personal Insights about Change & Tool Guide
- Retirement: Thinking it Through & Tool Guide
- Retirement Vision & Tool Guide
- My Ideal Week in Retirement & Tool Guide
- Designing Your Financial Legacy & Tool Guide

### Goals

- Introduction (planner & client versions)
- Personal Insights about Planning & Goal Setting & Tool Guide
- Visualize Your Future & Tool Guide
- Visualize Your Ideal Business
- Goals for Life & Tool Guide
- Clarify Your Life Goals & Tool Guide
- Clarify Your Business Goals

## PRACTICE MANAGEMENT RESOURCES

MQ True Wealth Process & Tool Design

Client Meeting Schedule Templates (five)

What is True Wealth Planning?

Time Management Tactics

True Wealth Tools Checklist

True Wealth Tools Note Sheets

Tips and Strategies for Navigating True Wealth Planning Conversations

What Do You Do? Worksheet

My Mission, My Message Worksheet

True Wealth Planning Soundbites

Sample Letters Introducing True Wealth Approach

- Prospective Client Letter
- Existing Client Letter

Aligning True Wealth & 6-Step FP Processes (chart)

The MQ Model for True Wealth Planning When SMART Goals Are Not Always Wise

Your True Wealth Plan Action Steps

General Client Information Sheet

Simple Financial Statement

Completing Interactive True Wealth Worksheets

True Wealth Summary Sheets

- Summary Sheets Guide
- "Business of Life" Article
- Key Elements for Creating Your True Wealth Plan
- Plan for Success
- Foundation of Your True Wealth Plan

Raise Your MQ Workbook Note Sheets

Raise Your MQ Workbook Checklist



# DIAMOND LEVEL: ALL INCLUSIVE TRUE WEALTH™ PLANNING PACKAGE

(additional items not included in Platinum Level are shown in bold)

## ADDITIONAL MODULES

Article Library Access

“Measure Your MQ” Self-Assessment, “Raise Your MQ” Workbook, & related presentation materials

“Designing Your Life In Retirement” Workbook & related presentation materials

“No Rules Retirement” Workbook & related presentation materials

Journey Into Elderhood Workbook

## TRAINING AND BENEFITS

### Implementation Consulting Program (ICP)-(first year of MQ Partnership only)

1. **Virtual Debrief and Strategic Planning Meeting**
2. Virtual Orientation Meeting
3. Twelve (12) Virtual Consultations
4. **Two-day Onsite Customized Consultation at location of your choice**
5. **Customization of all client-facing MQ materials**

### Ongoing (on-going following first year of MQ Partnership)

1. One (1) Annual Review Call
2. **Two (2) Annual Coaching Calls**
3. Free Registration for all MQ Webinars
4. **Free Registration for all Annual MQ Events**
5. **Alumni Pricing for all MQ Advanced Trainings & MQU Courses**
6. Online MQ Community Discussion Forum
7. Online MQ Education Archive
8. **Updates to customizations of client-facing MQ materials**
9. Discounted pricing for printed versions of:
  - “Designing Your Life in Retirement” Workbooks & related presentation materials
  - “Measure Your MQ” Self-Assessment, “Raise Your MQ” Workbook, & related presentation materials
  - “No Rules Retirement” Workbooks & related presentation materials
  - “Journey Into Elderhood” Booklet

## ADDITIONAL MODULES

Money Quotient also offers an array of additional product options that can be added to our Partnership Levels.

ADDITIONAL MODULES	BENEFITS
<p><b>Life Transitions Worksheets &amp; Workbook Generator</b></p> <p>Note: The Life Transitions Worksheets and Workbook Generator are automatically included in the Gold, Platinum, and Diamond Levels at no additional charge.</p>	<p>Life Transitions Reference Manual</p> <p>Online access to a la carte menu of all 52 worksheets for unlimited use</p> <p>Unlimited access to the web-based software (workbook generator) for creating customized Life Transitions Workbooks</p> <p>Orientation &amp; consulting phone meeting</p>
<p><b>Measure Your MQ Self-Assessment &amp; Raise Your MQ Workbook</b> with PowerPoint presentation and Workshop Facilitator Guide</p> <p>Note: The Measure Your MQ Assessment and Raise Your MQ Workbook are automatically included in the Platinum and Diamond Levels at no additional charge.</p>	<p>Electronic reference manual</p> <p>Unlimited online access to workbook content in PDF format, workshop Facilitator Guide in PDF format &amp; PowerPoint presentation</p> <p>Reference copies of the Facilitator Guide &amp; PowerPoint presentation</p> <p>Orientation &amp; consulting phone meeting</p>
<p><b>Designing Your Life in Retirement Workbook</b> with PowerPoint presentation and Workshop Facilitator Guide</p> <p>Note: The Designing Your Life in Retirement Workbook is automatically included in the Platinum and Diamond Levels at no additional charge.</p>	<p>Electronic reference manual</p> <p>Unlimited online access to workbook content in PDF format, workshop Facilitator Guide in PDF Format &amp; PowerPoint presentation</p> <p>Reference copies of the Facilitator Guide &amp; PowerPoint presentation</p> <p>Orientation &amp; consulting phone meeting</p>
<p><b>No Rules Retirement Workbook</b> with PowerPoint presentation and Workshop Facilitator Guide</p> <p>Note: The No Rules Retirement Workbook is automatically included in the Platinum and Diamond Levels at no additional charge.</p>	<p>Electronic reference manual</p> <p>Unlimited online access to content in PDF format, workshop Facilitator Guide in PDF Format &amp; PowerPoint presentation</p> <p>Reference copies of the Facilitator Guide &amp; PowerPoint presentation</p> <p>Orientation &amp; consulting phone meeting</p>

ADDITIONAL MODULES	BENEFITS
<p><b>Article Library</b></p> <p>Note: The Article Library is automatically included in the Platinum and Diamond Levels at no additional charge.</p>	<p>Access to online archive of True Wealth™ Planning articles</p> <p>Unlimited use of articles for a variety of uses: educational handouts, web site content, content for publications, etc.</p> <p>Orientation &amp; consulting phone meeting</p>
<p><b>Journey into Elderhood Booklet</b></p> <p>Note: The Journey into Elderhood Booklet is automatically included in the Platinum and Diamond Levels at no additional charge.</p>	<p>Electronic reference manual</p> <p>Unlimited online access to content in PDF format</p> <p>Option to purchase preassembled workbooks</p> <p>Orientation &amp; consulting phone meeting</p>

## FIRST STEP CASH MANAGEMENT SYSTEM™

First Step is available for licensing as a stand-alone product or can be added to a new or existing MQ Partnership Agreement.

CASH FLOW PROGRAM	BENEFITS
<p><b>First Step Cash Management System™</b></p> <p>This web-based program was developed by The Planning Center and is distributed by Money Quotient. This program provides clients with a simple, but highly effective, method for managing cash flow, reducing debt, and increasing savings.</p>	<p>One administrator account and 100 client sub-accounts</p> <p>Option to license additional client sub-accounts</p> <p>Electronic User's Manual</p> <p>Orientation phone meeting</p> <p>Two 90-minute training webinars</p> <p>Partners may repeat Training Webinars for free within the first year</p> <p>"First Step Introduction" - presentation for use with clients (includes PowerPoint slides and script)</p> <p>Discounted fees for MQ webinars and teleconferences</p>

## ADDITIONAL SERVICES

TRAINING & LEARNING OPPORTUNITIES	BENEFITS
<p><b>“Fundamentals of True Wealth Planning” Training</b></p> <p>This intensive 3-day course, covers both the philosophical foundation and practical application of the MQ® model of True Wealth Planning. Gain hands on experience while learning how to integrate and custom-fit the MQ tools, to your personality, practice, and process.</p> <p>Completion of this course is a prerequisite to accessing the Money Quotient materials and benefits beyond the Sampler level.</p>	<p>Completes prerequisite to license Silver, Gold, and Platinum materials and benefits</p> <p>Upon completion, you will receive</p> <ul style="list-style-type: none"><li>• Certificate of Completion</li><li>• 24 CEU credits approved by the CFP Board</li></ul> <p>Additional benefits you will receive upon licensing the Silver, Gold, or Platinum Level:</p> <ul style="list-style-type: none"><li>• Name and contact information placed on the “Find a True Wealth Planning Professional” Directory</li><li>• Option to repeat “Fundamentals of True Wealth Planning” training at special alumni pricing</li></ul>
<p><b>“Principles of Client Communication and Discovery” - Advanced Training</b></p> <p>This unique MQ Learning Opportunity is designed specifically for MQ Partners who have completed our “Fundamentals of True Wealth Planning” training and are seeking additional skills, insight, and mastery in regard to client communication and discovery.</p>	<p>Learn the “interpretive approach” to understanding client responses to MQ tools</p> <p>Adopt a framework of key psychological principles that will quickly give you insight regarding your clients’ perceptions, values, attitudes, and beliefs</p> <p>Master simple strategies for facilitating meaningful conversation and ongoing discovery using MQ tools as a starting point</p> <p>Certificate of Completion &amp; recognition of achievement listed on Professional Directory</p> <p>11.5 CEU credits approved by the CFP Board</p>
<p><b>“Empowering Change: Understanding Motivations and Guiding Financial Decision Making” - Advanced Training</b></p> <p>This unique MQ Learning Opportunity is designed specifically for MQ Partners who have completed our “Fundamentals of True Wealth Planning” training and are seeking additional skills and mastery of concepts relating to a successful True Wealth Planning process.</p>	<p>Examine the MQ Model for True Wealth Planning and the indispensable role it plays in facilitating positive change in your clients’ lives</p> <p>Increase your understanding of how and why the True Wealth Model works so well by exploring current research and thinking in relevant areas of study</p> <p>Learn to leverage MQ materials and help your clients get in touch with their underlying motivations</p> <p>Certificate of Completion &amp; recognition of achievement listed on Professional Directory</p> <p>11.5 CEU credits approved by the CFP Board</p>

TRAINING & LEARNING OPPORTUNITIES	BENEFITS
<p><b>Webinars &amp; Online Courses</b></p> <p>Webinars &amp; teleconferences are designed and scheduled to support your personal and professional growth</p>	<p>Speakers and topics are carefully selected to support best practices in financial planning, enhance client relationships, and align with the MQ Model of True Wealth Planning</p>
<p><b>Consulting Calls &amp; Consulting Packages</b></p> <p>Contact MQ to create a customized consultation package to support you and your specific needs</p>	<p>Receive recording of all calls</p> <p>Detailed summary of discussions &amp; suggestions with time stamps of when discussed during recording</p> <p>Direct assistance with creation or development of project</p>