Money Quotient®
Life with a Capital L™

THE MQ TRUE WEALTH™ MODEL FACILITATES & ENHANCES THE 7-STEP FINANCIAL PLANNING PROCESS

MQ True Wealth Process	7-Step FP Process
EXPLORE	1. Establish and define client-planner relationship
ENGAGE	2. Gather client data and establish goals
ENVISION	
ENLIGHTEN	3. Analyze and evaluate the client's financial status
	4. Develop the financial plan
	5. Presenting the financial plan
EMPOWER	6. Implement the financial plan
	7. Monitor the financial plan