MONEY QUOTIENT TOOLS AT-A-GLANCE

Each MQ Partner Level is a progression of the level before, and new MQ Tools are shown in bold.

STAGE	SAMPLER (Only available for 3-month license)	SILVER In-Depth Data Gathering	GOLD In-Depth Data Gathering And Goal Setting	PLATINUM Complete True Wealth™ Planning Tool Kit	DIAMOND All-Inclusive
Explore Stage: establish client relationship & build trust; understand main concerns & aspirations	• **Financial Satisfaction Survey** • **Present Financial Life** • **Life Transitions Survey**	• Financial Satisfaction Survey • Life Transitions Survey • Present Financial Life • **Financial History** • **Business Financial Satisfaction Survey** • **Business Transition Survey** • **Retirement: Thinking it Through**	• Financial Satisfaction Survey • Life Transitions Survey • Present Financial Life • Financial History • Business Financial Satisfaction Survey • Business Transition Survey • Retirement: Thinking it Through	• Financial Satisfaction Survey • Life Transitions Survey • Present Financial Life • Financial History • Business Financial Satisfaction Survey • Business Transition Survey • Retirement: Thinking it Through	Ask for more details
Engage Stage: gain understanding of client's perspective, preferences, and core values		• **Personal Insights About Money** • **Personal Insights from your Career Path** • **Wheel of Life** • **Wheel of My Business** • **Personal Insights about Change**	• Personal Insights About Money • Personal Insights from your Career Path • Wheel of Life • Wheel of My Business • Personal Insights about Change • **Personal Insights about Life Balance** • **Personal Insights about Work/ Life Balance**	• Personal Insights About Money • Personal Insights from your Career Path • Wheel of Life • Wheel of My Business • Personal Insights about Change • Personal Insights about Life Balance • Personal Insights about Work/ Life Balance • **Defining True Wealth** • **Money Memories**	Ask for more details
Envision Stage: guide client in creating a vision of an ideal life; establish meaningful goals			• **Investing Your Time and Energy** • **Personal Insights about Planning & Goal Setting** • **Visualize Your Future** • **Visualize My Ideal Business** • **Goals for Life** • **Clarify Your Life Goals** • **Retirement Vision** • **My Ideal Week in Retirement**	• Investing Your Time and Energy • Personal Insights about Planning & Goal Setting • Visualize Your Future • Visualize My Ideal Business • Goals for Life • Clarify Your Life Goals • Retirement Vision • My Ideal Week in Retirement	Ask for more details
Enlighten Stage: advisors present draft of financial plan & connect each recommendation to values & goals		• **Key Elements for Creating your True Wealth Plan** • **Plan for Success** • **Foundation of your True Wealth Plan** • **Your True Wealth Plan Action Steps**	• Key Elements for Creating your True Wealth Plan • Plan for Success • Foundation of your True Wealth Plan • Your True Wealth Plan Action Steps	• Key Elements for Creating your True Wealth Plan • Plan for Success • Foundation of your True Wealth Plan • Your True Wealth Plan Action Steps	Ask for more details
Empower Stage: advisor guides and supports client in implementation maintaining focus on values & goals			• **Life Transitions Worksheets** • **Life Transitions Workbook Generator**	• Life Transitions Worksheets • Life Transitions Workbook Generator • **Measure Your MQ Self-Assessment & Raise Your MQ Workbook**	Ask for more details
Additional Modules, Training & Benefits	• **Advisor Guides** • **Free MQ Webinars** • **MQ Community Discussion Forum** • **Education Archive** • **7 Unique Practice Management Tools**	• Advisor Guides • Free MQ Webinars • MQ Community Discussion Forum • Education Archive • **One Annual Update Meeting** • **Implementation Consulting Program & Discussion Forums** • **6 Implementation Consultations** • **5 Group Communication Coaching Workshops** • **23 Unique Practice Management Tools**	• Advisor Guides • Free Registration for MQ Webinars • Online MQ Community Discussion Forum • Online MQ Education Archive • One Annual Review Call • Implementation Consulting Program & Discussion Forums • **9 Implementation Consultations** • **6 Group Communication Coaching Workshops** • **25 Unique Practice Management Tools**	• Advisor Guides • Free Registration for MQ Webinars • Online MQ Community Discussion Forum • Online MQ Education Archive • One Annual Review Call • Implementation Consulting Program & Discussion Forums • **12 Implementation Consultations** • 6 Group Communication Coaching Workshops • 25 Unique Practice Management Tools • **One Annual Consultation** • **Client Article Library** • **No Rule Retirement Workbook** • **Designing Your Life in Retirement Workbook** • **Journey into Elderhood Workbook**	Ask for more details

Attending the True Wealth Planning training course gives an overview of each MQ Partnership Level, and our team will help you select which partnership is best for you and your practice. Each level has a customizable mentorship program that will help you every step of the way in building out your personalized client process.

PRICING	SAMPLER (Only available for 3-month license)	SILVER In-Depth Data Gathering	GOLD In-Depth Data Gathering And Goal Setting	PLATINUM Complete True Wealth Planning Tool Kit	DIAMOND All Inclusive True Wealth Planning Package
	One-Time Fees				
PRE-REQUISITE COURSE REQUIRED "Fundamentals of MQ True Wealth Planning"	**None**	**$1,850 early bird price**	**$1,850 early bird price**	**$1,850 early bird price**	Ask for more details
IMPLEMENTATION CONSULTING PROGRAM	**$150.00/user**	**$3,000.00/1st user**	**$4,500.00/1st user**	**$6,000.00/1st user**	
		$1,500.00/each add'l user	*$1,500.00/each add'l user*	*$1,500.00/each add'l user*	
	Ongoing Fees				
MONTHLY LICENSING FEES*	**$50.00/user**	**$70.00/user***	**$115.00/user***	**$175.00/user***	***25% off for 2-3 advisors** **35% off for 4-10 advisors***
*Discounts On Monthly Licensing Fees (only on Monthly Licensing Fees and for two or more Advisors on the Same License)	*None*	**25% off for 2-3 advisors 35% off for 4-10 advisors*	**25% off for 2-3 advisors 35% off for 4-10 advisors*	**25% off for 2-3 advisors 35% off for 4-10 advisors*	