

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 <small>(Only available for 3-month license)</small>	SILVER <small>In-Depth Data Gathering</small>	GOLD <small>In-Depth Data Gathering And Goal Setting</small>	PLATINUM <small>Complete True Wealth™ Planning Tool Kit</small>	DIAMOND <small>All-Inclusive</small>
Explore Stage: establish client relationship & build trust; understand main concerns & aspirations	<ul style="list-style-type: none"> Financial Satisfaction Survey Present Financial Wealth Life Transitions Survey 	<ul style="list-style-type: none"> Financial Satisfaction Survey Life Transitions Survey Present Financial Life Financial History Business Financial Satisfaction Survey Business Transition Survey Retirement: Thinking it Through 	<ul style="list-style-type: none"> Financial Satisfaction Survey Life Transitions Survey Present Financial Life Financial History Business Financial Satisfaction Survey Business Transition Survey Retirement: Thinking it Through 	<ul style="list-style-type: none"> 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		<ul style="list-style-type: none"> Personal Insights About Money Personal Insights from your Career Path Wheel of Life Wheel of My Business Personal Insights about Change 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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			<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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		<ul style="list-style-type: none"> Key Elements for Creating your True Wealth Plan Plan for Success Foundation of your True Wealth Plan Your True Wealth Plan Action Steps 	<ul style="list-style-type: none"> Key Elements for Creating your True Wealth Plan Plan for Success Foundation of your True Wealth Plan Your True Wealth Plan Action Steps 	<ul style="list-style-type: none"> 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			<ul style="list-style-type: none"> Life Transitions Worksheets Life Transitions Workbook Generator 	<ul style="list-style-type: none"> Life Transitions Worksheets Life Transitions Workbook Generator Measure Your MQ Self-Assessment & Raise Your MQ Workbook 	Ask for more details
Additional Modules, Training & Benefits	<ul style="list-style-type: none"> Advisor Guides Free MQ Webinars MQ Community Discussion Forum Education Archive 7 Unique Practice Management Tools 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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 Designing Your Financial Legacy 	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 <small>(Only available for 3-month license)</small>	SILVER <small>In-Depth Data Gathering</small>	GOLD <small>In-Depth Data Gathering And Goal Setting</small>	PLATINUM <small>Complete True Wealth Planning Tool Kit</small>	DIAMOND <small>All Inclusive True Wealth Planning Package</small>
	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
<small>*Discounts On Monthly Licensing Fees (only on Monthly Licensing Fees and for two or more Advisors on the Same License)</small>	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	