

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 <i>In-Depth Data Gathering</i>	GOLD <i>In-Depth Data Gathering And Goal Setting</i>	PLATINUM <i>Complete True Wealth™ Planning Tool Kit</i>	DIAMOND <i>All-Inclusive</i>
Explore Stage: establish client relationship & build trust; understand main concerns & aspirations	<ul style="list-style-type: none"> Financial Satisfaction Survey Life Transitions Survey Present Financial Life 	<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 Implementation Consulting Program & Discussion Forums Access to the MQ Curriculum Classroom & Cohort 6 Study Team Meetings 4 Group Communication Coaching Workshops 1 One-on-One Consulting Call 24 Unique Practice Management Tools 	<ul style="list-style-type: none"> Advisor Guides Free MQ Webinars MQ Community Discussion Forum Education Archive Implementation Consulting Program & Discussion Forums Access to the MQ Curriculum Classroom & Cohort 7 Study Team Meetings 6 Group Communication Coaching Workshops 1 One-on-One Consulting Call 26 Unique Practice Management Tools 	<ul style="list-style-type: none"> Advisor Guides Free MQ Webinars MQ Community Discussion Forum Education Archive Implementation Consulting Program & Discussion Forums Access to the MQ Curriculum Classroom & Cohort 7 Study Team Meetings 6 Group Communication Coaching Workshops 29 Unique Practice Management Tools 3 One-on-One Consulting Calls 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 <i>In-Depth Data Gathering</i>	GOLD <i>In-Depth Data Gathering And Goal Setting</i>	PLATINUM <i>Complete True Wealth Planning Tool Kit</i>	DIAMOND <i>All Inclusive True Wealth Planning Package</i>
	One-Time Fees				
PRE-REQUISITE COURSE REQUIRED <small>"Fundamentals of MQ True Wealth Planning"</small>	None	Early Bird Prices: \$2,200 Virtual Training \$2,400 In-Person Training	Early Bird Prices: \$2,200 Virtual Training \$2,400 In-Person Training	Early Bird Prices: \$2,200 Virtual Training \$2,400 In-Person Training	Ask for more details
IMPLEMENTATION CONSULTING PROGRAM	\$150.00/user	\$3,000.00/user*	\$4,500.00/user*	\$6,000.00/user*	
DISCOUNTS		<i>*25% off for 2-3 advisors 35% off for 4-10 advisors</i>	<i>*25% off for 2-3 advisors 35% off for 4-10 advisors</i>	<i>*25% off for 2-3 advisors 35% off for 4-10 advisors</i>	
	Ongoing Fees				
MONTHLY LICENSING FEES	\$50.00/user	\$90.00/user*	\$145.00/user*	\$190.00/user*	
DISCOUNTS	None	<i>*25% off for 2-3 advisors 35% off for 4-10 advisors</i>	<i>*25% off for 2-3 advisors 35% off for 4-10 advisors</i>	<i>*25% off for 2-3 advisors 35% off for 4-10 advisors</i>	*25% off for 2-3 advisors 35% off for 4-10 advisors