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
Explore Stage: establish client relationship & build trust; understand main concerns & aspirations	• **Financial Satisfaction Survey** • **Life Transitions Survey** • **Present Financial Life**	• Financial Satisfaction Survey • Life Transitions Survey • Present Financial Life • **Financial History** • **Business Financial Satisfaction Survey** • **Business Transition Survey** • **Retirement Financial Satisfaction Survey** • **Retirement Life 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 Financial Satisfaction Survey • Retirement Life 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 Financial Satisfaction Survey • Retirement Life Transition Survey • Retirement: Thinking it Through
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 Money • Personal Insights from your Career Path • Wheel of Life • Wheel of My Business • **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 Life Balance • Personal Insights about Work/Life Balance • **Defining True Wealth** • **Money Memories**
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
Enlighten Stage: advisors present draft of financial plan & connect each recommendation to values & goals		• **Personal Insights about Change** • **Key Elements for Creating your True Wealth Plan** • **Plan for Success** • **Foundation of your True Wealth Plan** • **Your True Wealth Plan Action Steps**	• Personal Insights about Change • Key Elements for Creating your True Wealth Plan • Plan for Success • Foundation of your True Wealth Plan • Your True Wealth Plan Action Steps	• Personal Insights about Change • Key Elements for Creating your True Wealth Plan • Plan for Success • Foundation of your True Wealth Plan • Your True Wealth Plan Action Steps
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**
Additional Modules			• **Life Transitions Worksheets** • **Life Transitions Workbook Generator**	• Life Transitions Worksheets • Life Transitions Workbook Generator • **Client Article Library** • **Measure Your MQ Self-Assessment & Raise Your MQ Workbook** • **No Rules Retirement** • **Designing Your Life in Retirement Workbook** • **Journey into Elderhood Workbook** • **Designing Your Financial Legacy**
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 • **1 Annual Reset & Renew Roundtable** • **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**	• Advisor Guides • Free MQ Webinars • MQ Community Discussion Forum • Education Archive • Implementation Consulting Program & Discussion Forums • Access to the MQ Curriculum Classroom & Cohort • 1 Annual Reset & Renew Roundtable • **7 Study Team Meetings** • **6 Group Communication Coaching Workshops** • **1 One-on-One Consulting Call** • **26 Unique Practice Management Tools**	• 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 Annual Reset & Renew Roundtable • **29 Unique Practice Management Tools** • **3 One-on-One Consulting Calls** • **One Annual Consultation**

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
	One-Time Fees			
FUNDAMENTALS OF TRUE WEALTH TRAINING (Required Before Licensing)	**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**
IMPLEMENTATION PROGRAM (Required After Licensing)	**$150.00/user**	**$3,000.00/user***	**$4,500.00/user***	**$6,000.00/user***
DISCOUNTS		**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*
	Ongoing Fees			
MONTHLY LICENSING FEES (Ongoing)	**$50.00/user**	**$90.00/user***	**$145.00/user***	**$190.00/user***
DISCOUNTS	*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*