Money Quotient®
Life with a Capital L™

Entry Level Materials

True Wealth Planning Client Tools	• Financial Satisfaction Survey • Life Transitions Survey • Present Financial Life • Financial History • Retirement Financial Satisfaction Survey • Retirement Life Transition Survey

Client-Facing Support Materials	• General Client Information Form
	• Simple Financial Statement
	• Retirement Simple Financial Statement
	• Getting Acquainted Meeting
	    • E-mail Template
	    • Meeting Agenda
	• Annual Update Meeting
	    • Introducing MQ - Email Template
	    • Introducing MQ - Meeting Agenda
	    • Repeat MQ - Email Template
	    • Repeat MQ - Meeting Agenda
	• Inquiry Topic Introductions (articles)
	    • Satisfaction & Values Introduction
	    • Biography Introduction
	    • Transitions Introduction

Advisor Guides	• Pre-screen Call Guide • Getting Acquainted Meeting Guide • Annual Update Meeting Guide • Financial Satisfaction Tool Guide • Life Transition Tool Guide • Present Financial Life Interview Guide • Financial History Interview Guide
Advisor Support Materials	• Master Task List - Entry Level • Post-Meeting Reflective Questions • Time Management Tactics • Tips & Strategies for Navigating True Wealth Planning Conversations • Recommended Reading

Education Archive

Prospects & Marketing	• Explore Stage - Prospects • Marketing - Leading with Your Why
Refining Your Onboarding Process	• How to Successfully Facilitate Conversations Around the MQ Tools • Motivational Interview for Financial Planners • Facilitating Awareness of Satisfaction & Values • Understanding Life Transitions • How Biography Shapes Our Perspective
Using MQ Tools with Ongoing Clients	• Annual Update Meetings • MQ Partner Experience: Introducing the MQ Tools to Existing Clients • An Introduction to "No Rules Retirement" Workbook • Help Your Clients Measure and Raise Their MQ
Practice Management	• Effective Time Management • Creating an Engaging Client Appreciation Event • Creating a Collaborative Client Experience • Creative Strategies: Discovery Process and Policy-Based Financial Planning • Incorporating MQ into Systems Advisors Use
Deeper Dives	• Developing and Maintaining Client Trust and Commitment in a Rapidly Changing Environment • Lessons Learned from the Pandemic, Shutdowns, and Financial Uncertainty • From Resistance to Action: Motivating Clients to Implement Your Advice • Belief Systems
MQ and First Step in Action	• MQ in Action: Christopher Castles, ACS • MQ in Action: Melinda Davis, CFP®, CRPC® • MQ in Action: Peggy Kessinger, MBA, CFP® and Tim Kober, CFP® • MQ in Action: Steve Hazel, CFP®, CHCP®, EA, RICP®, AIF® • MQ in Action: Lexi Olion, CFP® • MQ in Action: Jennifer Luzzatto, CFA, CFP® & Michael Sigmon, CFP® • MQ in Action: Gary Dean, CEO of TrustCore • MQ in Action: Dan Johnson, CFP®