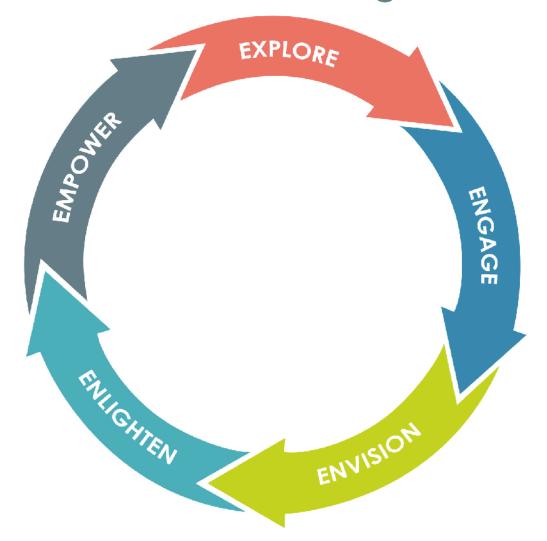


## 5-E Finacial Life Planning Process™



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There are five stages to the Money Quotient True Wealth Planning process. The following outlines the objectives of each stage and the role of your financial advisor.

**EXPLORE:** Get Acquainted • Learn about Your Needs, Concerns, and Aspirations • Provide Information/Describe Process • Relate Services to Your Issues • Determine Fit and Establish Relationship

**ENGAGE:** Gain Awareness Regarding Your Unique Frame of Reference • Listen to Your Perspective • Identify Your True Values • Clarify Your Priorities

ENVISION: Guide You in Creating a Vision of Your Ideal Life • Help You to Define and Prioritize Your Personal and Financial Goals • Establish Guidelines for Developing a Financial Plan that Aligns with Your Values and Priorities

ENLIGHTEN: Summarize and Clarify Insights and Knowledge about Your Values, Priorities, Concerns, Transitions, Goals, and Objectives • Demonstrate How the Financial Solutions Proposed Support Your Life Vision and Goals

EMPOWER: Monitor Progress and Help Maintain Focus on Your Personal and Financial Goals • Review Your Life Goals Periodically to Ensure Your Financial Plan Continues to Support Your Life Vision • Address New Issues, Transitions, and Concerns