



5-E Financial Life Planning Process™



© 2002-2019 Money Quotient, Inc. Used By Permission

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