ENOW FINANCIAL

MQ In Action

Integrating* Money Quotient into the XYPN Tech Stack

James Hindes | June 2022

*Integrating in a not very technical sense

A Little Background

ENOW Financial

A fee-only, solo (hopefully not for long) RIA providing comprehensive financial planning to people under 55 that incorporates appreciative life planning to unearth the client's concerns, transitions and desired future.

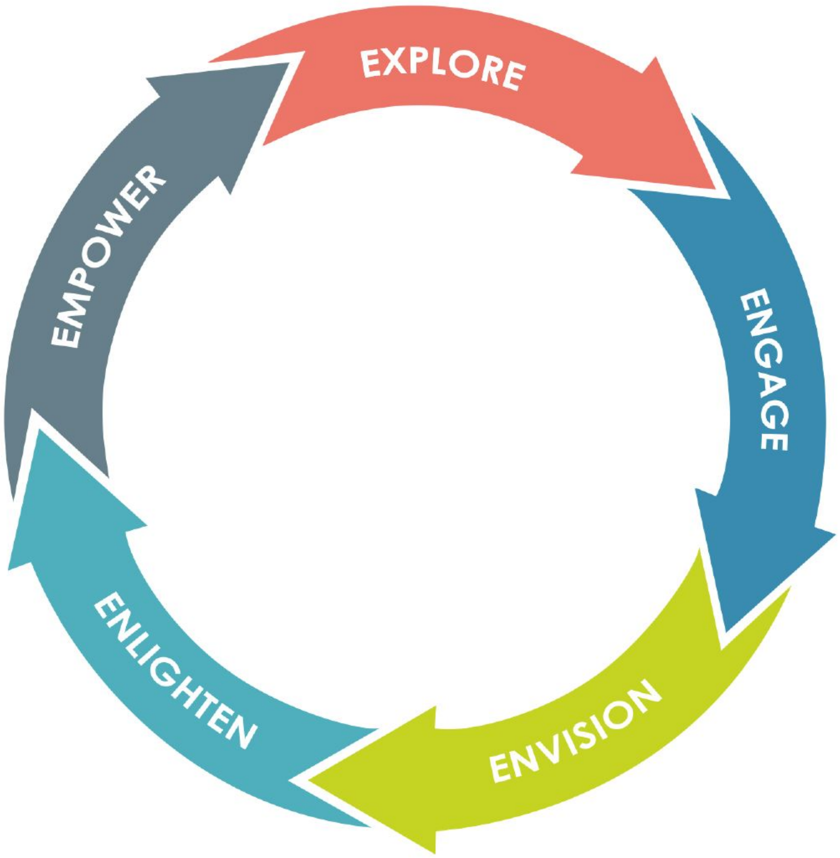
Money Quotient

Money Quotient focuses on both the subjective and objective factors that either enhance or hinder financial satisfaction and quality of life. According to their underlying philosophy, an individual's "real" financial well-being (MQ) is comprised of two essential components: emotional intelligence (EQ) and financial knowledge (IQ).

Tools Mentioned Today

- Wealthbox (part of the XYPN stack)
- RightCapital (part of the XYPN stack)
- Calendly
- Pulse 360
- Zapier

MQ True Wealth™ Process



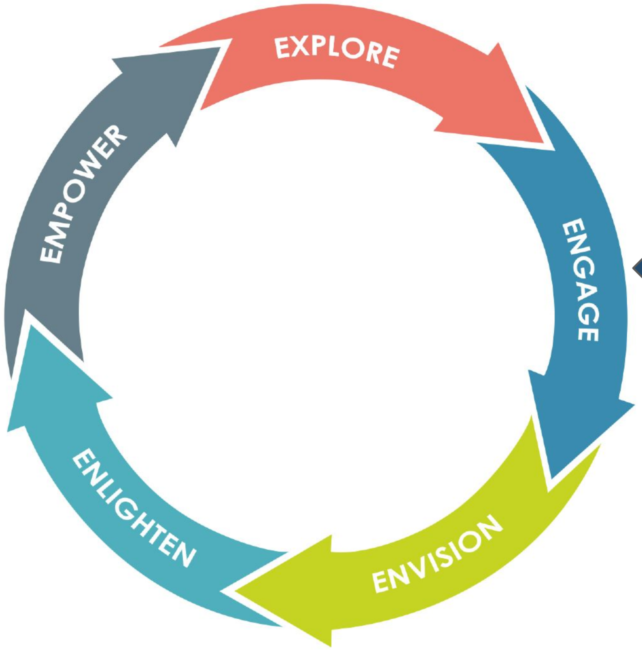
Objective

Capture the desired qualitative data from Money Quotient conversations:

1) Keep the client's "Keys to Your Financial Plan" visible, referenceable.
    a) Vision, Values, Transitions, Concerns, Goals
2) Capture relevant qualitative data into client deliverables.

Context: A Single Meeting

MQ True Wealth™ Process



Engage: Discovery Meeting

Personal Insights About Money
The Wheel of Life

Post-meeting homework:
Personal Insights About Life Balance
Visualize Your Future

Map your client’s journey to process and tools

Enter	Engage	Exit	Extend
What do people experience as they begin the process?	In the core moments in the process, what happens?	What do people typically experience as the process finishes?	What happens after the experience is over?
Book Meeting [Calendly]	Conversation [Zoom]	Takeaways Conversation [Zoom]	Notes, Next Steps [Email]
Step may have been completed by Advisor	Hands On Activities [Zoom]	Next Steps [Zoom]	
Receive Prep Work [email]	More Conversation [Zoom]		
Learn [email or web]			
Light reading about the MQ stage			
Complete Prep Work [web forms]			

Note: today is focused on the Money Quotient objectives in the process

Pre-Meeting Automations

Start workflow in Wealthbox CRM when invitee created in Calendly

Calendly + Wealthbox CRM

+5

0.0 Relate WB Event to WB Client

Meeting parameters imported from Wealthbox via live integration

Pre-Meeting Activities

- Assemble and Send the Agenda

In-Meeting Activities

- Take notes

Post-Meeting Automations

Meeting notes, tasks, workflows exported to Wealthbox via live integration

Post-Meeting Activities (Manual)

Pulse: Capture Keys

Pulse: Capture Recommendations (incorporate Keys)

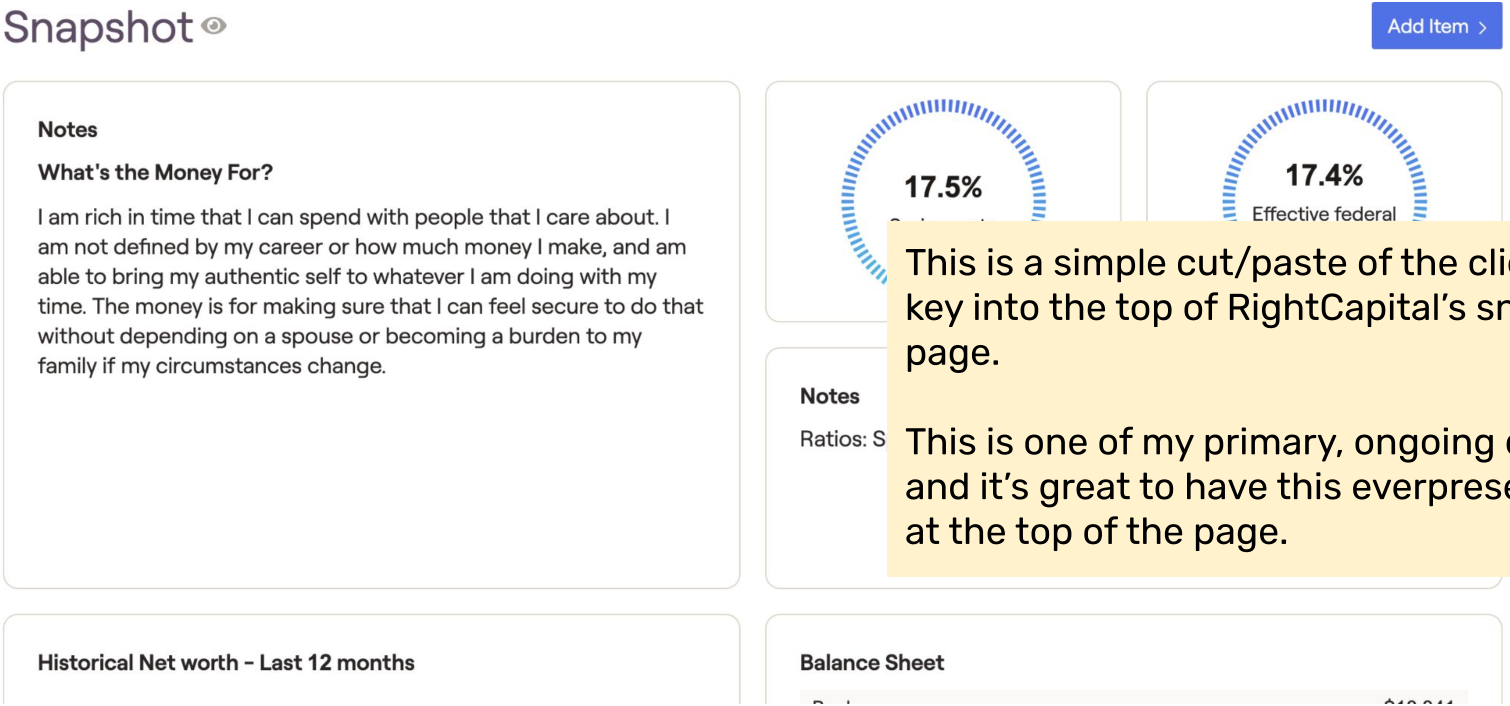
Pulse: Keys to PDF if appropriate

Post-Meeting Activities (manual)

Keys to Your Financial Plan -> RightCapital

Keys to Your Financial Plan -> Wealthbox

The Keys to Your Financial Plan -> RightCapital



This is a simple cut/paste of the client's "Vision" key into the top of RightCapital's snapshot page.

This is one of my primary, ongoing deliverables, and it's great to have this everpresent reminder at the top of the page.

The Keys to Your Financial Plan -> RightCapital

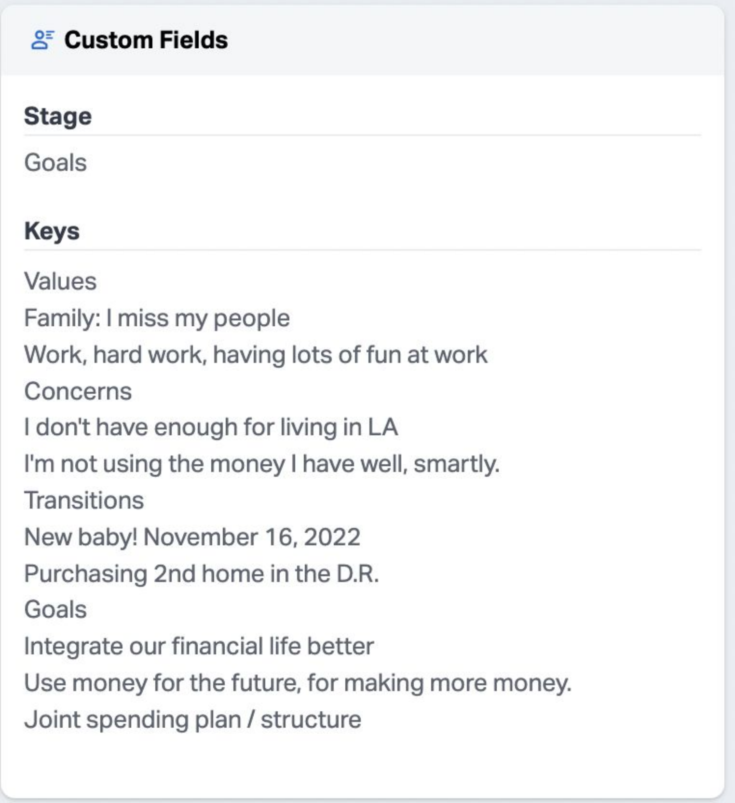
Current Tasks

Add Task ›

Due Date	Assign to	Tasks
Future		
☐ 06/26/2022	James Hindes	ⓘ **Increase your 401(k) savings percentage** ...from 4% to 14%. **Key Concern: I'm not using the money I have well, smartly.** Expository / background text starts here.....

This is a copy/paste from the Pulse 360 note into a Rightcapital task, with some quick formatting. Again, keeping the “Keys to Your Financial Plan” front and center.

The “Keys to Your Financial Plan” -> Wealthbox



The screenshot is from a contact record.

This is a one step cut/paste from the “Keys” document in pulse (copy document) into a single custom field in Wealthbox.

I recently migrated from five custom fields to one to optimize this step.

This provides me a quick checkpoint as I enter any client interaction.

Questions?