

HOW THE MQ 5-E MODEL FACILITATES & ENHANCES THE 6-STEP FINANCIAL PLANNING PROCESS

5-E FLP Process	6-Step FP Process
EXPLORE	1. Establish and define client-planner relationship
ENGAGE	2. Gather client data and establish goals
ENVISION	3. Analyze and evaluate the client's financial status
ENLIGHTEN	4. Develop and present the financial plan
EMPOWER	5. Implement the financial plan
EMPOWER	6. Monitor the financial plan