



THE MTM VAULT

MORE THAN MONEYSM WEALTH PLANNING

YOUR ROADMAP TO ELEVATE YOUR BUSINESS

BEST VIEWED WITH ADOBE ACROBAT READER.

 WWW.ADOBE.COM/READER

A FEW
YEARS
LATER...

Commoditized professional services business serving **high net worth** individuals—the **individual** is still the client.

YOUR CAREER BEGAN HERE

Commoditized professional services business, competing only on price, service and personal relationship—where the **individual** is the client.

NEW OFFERINGS ↗

Adding The MTM Vault digital system is your **roadmap** to differentiating your business, eliminating competition, and providing more value to clients.

↑ ↑ ↑ YOUR ELEVATED, NON-COMMODITIZED BUSINESS

Now, your elevated business rises above the restrictions imposed by commoditization. The MTM Vault offers added structure, clarity and value your competitors simply cannot. The **family** becomes the client and valuable multi-generational relationships are established and strengthened.



EVERYTHING YOU NEED TO OFFER MULTI-GENERATIONAL PLANNING. RIGHT FROM THE PALM OF YOUR HAND.

The MTM Vault is an advisor's digital system to offer multi-generational, "More Than MoneySM" wealth planning that will increase residual revenues, engage multiple generations of the family and eliminate competition.

"More Than MoneySM" wealth includes core values, family legacy, valuable life experiences and philanthropy.

By defining and protecting these assets, The MTM Vault offers value to clients your competitors simply cannot, and efficiently positions you as the family's most trusted advisor.

Your client's net worth is "More Than MoneySM"...

FAMILY SOCIAL CAPITAL **LEGACY**

FAMILY UNITY INTELLECTUAL CAPITAL **LIFE EXPERIENCES**

MORE THAN MONEYSM

CORE VALUES HUMAN CAPITAL

TRADITIONS SOCIAL RESPONSIBILITY

PHILANTHROPY

GRATITUDE

INTRODUCING THE MTM VAULT.

The MTM Vault is a time-efficient, advisor-guided digital system designed to increase family unity by engaging **multiple generations** actively—and effortlessly—throughout the cycle.

Guided 'tactics' will help your clients define, capture and perpetuate their **"More Than MoneySM" assets** including:

- ◆ Core values
- ◆ Family traditions
- ◆ Impactful life experiences
- ◆ Family legacy
- ◆ Philanthropy

The 'system' does much of the work—positioning you as the family's most trusted advisor.



THE MTM VAULT IS YOUR CLIENT'S ROADMAP TO LIVING AN 'A+LIFE'.

Living an 'A+LIFE' means having access to a system that encompasses:

- A: Advanced Analytics**
Discover shared family core values, individual communication styles and measure progress
- L: Legacy Development**
Define and communicate individual core values, family legacy and philanthropic intent/impact
- I: Impact Integration**
Enhance the purpose of the family's wealth, incentivize purposeful, positive behaviors from beneficiaries
- F: Family Governance**
Create formal family structures such as an advisory board, family bank and family constitution
- E: Experiences of Value**
Capture, protect and share the human, social and intellectual capital of your family

Please consider the following data:

61% of families rate **legacy development** as a top financial need.

—Mindscape Study

77% of families say it is important to leave **values and life lessons** as inheritance.

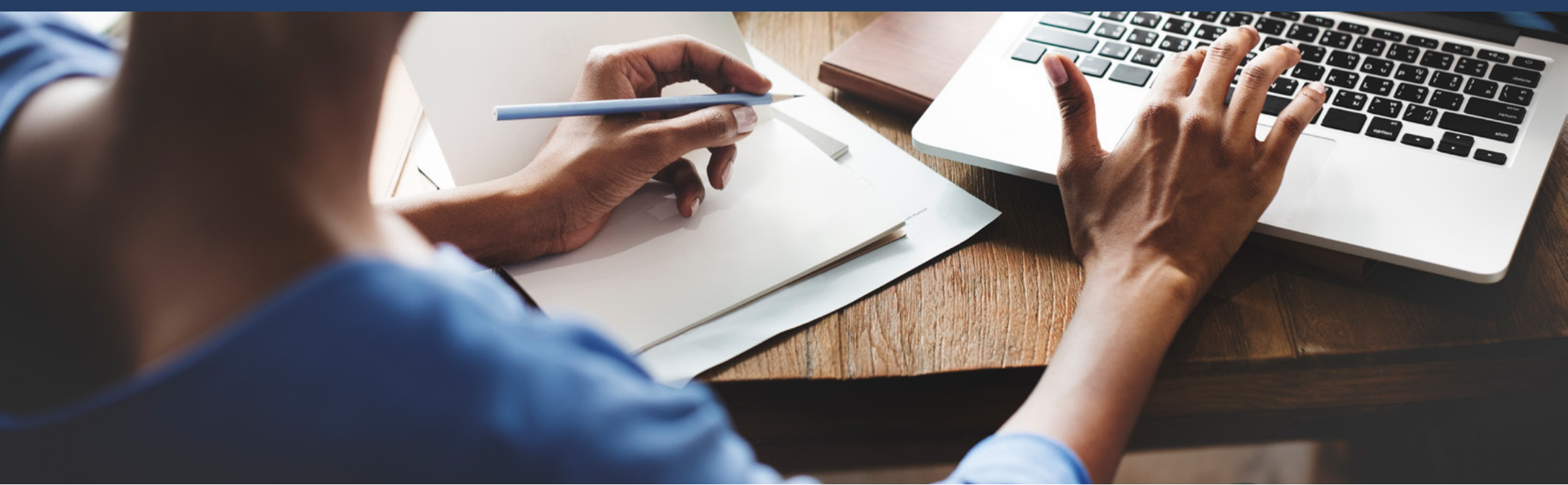
—Morningstar

91% of all **multi-generational wealth transfers fail** by the time the assets reach the wealth creators' grandchildren.

—For Love and Money, Roy Williams

"The MTM Vault is the answer I have been searching years for. HNW families are concerned about wealth transfer failure and most believe their net worth is more than money. **The MTM Vault addresses both** from the palm of your hand."

—Steve Alms, Family Office Advisor



THE MTM VAULT DIGITAL SYSTEM

The name of our digital system, The MTM Vault, is a nod to our motto, “**More Than MoneySM**”. This system serves as your **singular portal** to access and manage all facets of The MTM Vault:

- ◆ On-demand training
- ◆ Turn-key, well-organized advisor guidance
- ◆ Customized client assessment with multiple visual, numeric outputs
- ◆ Simple, elegant, time-efficient and effective structure
- ◆ Customized marketing brochure and presentations
- ◆ Communicate with clients and their heirs
- ◆ Ongoing technology upgrades and access to your MTM Support Team
- ◆ Mobile optimized, convenient, available 24/7/365

Advisor Dashboard:

ADVISOR DASHBOARD


THE MTM VAULT
MORE THAN MONEY™ WEALTH PLANNING

ADVISOR LOGO



- ADVISOR PROFILE
 - My Membership
 - Your Branding Kit
- COMMUNICATIONS
- THE A+LIFE ASSESSMENT

ON DEMAND TRAINING



MARKETING & BUSINESS GROWTH



THE CONSULTATIONS



MY CLIENTS



Start your 14 day free trial at
MoreThanMoneyVault.com to experience
all facets of The MTM Vault.

Client Dashboard:

Your Profile | Security Test Question | View & Edit Your Account

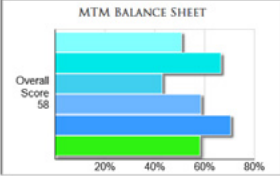
ADVISOR LOGO



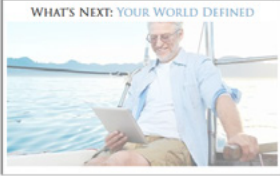
COMMUNICATIONS

- Message Your A+LIFE Advisor
- Marks Family Decision Center
- ALWAYS AVAILABLE
- SAVED CONTENT

MTM BALANCE SHEET




WHAT'S NEXT: YOUR WORLD DEFINED



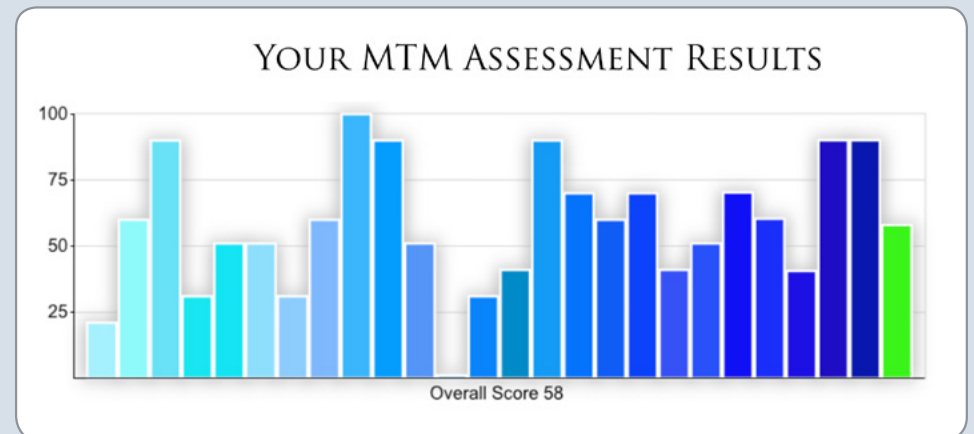
A+LIFE OVERVIEW

① **A+Time**

MY FAMILY



Example Assessment Results:





THE MTM VAULT WILL PROVIDE THE FOLLOWING BENEFITS TO ELEVATE YOUR BUSINESS:

- ◆ Scale your core business
- ◆ Eliminate competition
- ◆ Build valuable multi-generational relationships
- ◆ Maximize time-efficiency
- ◆ Grow your number of referral sources
- ◆ Market to existing, warm relationships
- ◆ Increase residual revenues
- ◆ Expand the paradigm of your client relationships
- ◆ Compliance-friendly (if applicable)

Simple, elegant, time-efficient and effective.

“The MTM Vault was a game changer for me. Effective marketing tools. Responsive support. It has allowed me to position my business for growth as it is a **wonderful prospecting tool.** I recommend it to anyone who wants to increase their number of top-level clients while increasing residual cash flow.”

—Stacey Fielder, Consultant



EXPAND YOUR VALUE TO CLIENTS WITH NO DISRUPTION, COMFORTABLY AND EFFICIENTLY.

- ◆ Layers on top of your existing business model. **No changes.**
- ◆ **Train your way:** on-demand, live webinar, or both.
- ◆ Market The MTM Vault to your existing, **warm relationships.**
- ◆ **Clients complete our simple, guided tactics, each in 30 minutes or less.**
No advisor time commitment required.
- ◆ Stay up to date with client progress automatically via text or email.
- ◆ **Available on any mobile device, tablet and computer.**
- ◆ Our simple, guided system maximizes time efficiency.

The MTM Vault digital system will efficiently provide **explosive growth** for firms, advisors and families alike.



THE MTM VAULT
MORE THAN MONEY™ WEALTH PLANNING

THE MTM VAULT WILL PROVIDE THE FOLLOWING VALUE TO YOUR CLIENTS:

- ◆ Create a statement of values
- ◆ Discover shared, family core values
- ◆ Define individual communication styles
- ◆ Define family legacy
- ◆ Incentivize positive behaviors from heirs
- ◆ Capture valuable life experiences
- ◆ Increase cohesion, family unity and communication
- ◆ Align existing professional advisors
- ◆ Define charitable intent
- ◆ Create a shared family philanthropic vision
- ◆ Measure the impact of the family's philanthropy
- ◆ Discover each individual's unique talent to offer philanthropies for maximum impact
- ◆ Enjoy shared, experiences of value together through philanthropy
- ◆ Establish a family Advisory Board
- ◆ Efficiently create a governing Family Constitution
- ◆ Encourage entrepreneurship consistent with the family values, legacy and philanthropy
- ◆ Create purposeful, family experiences of value
- ◆ Build a chronological 'timeline' of family experiences
- ◆ Create a Time Capsule of the family's most important tactics
- ◆ Build a customizable Digital Vault for safekeeping/uploading valuable documents, videos, pictures
- ◆ Launch a centralized, dynamic "Decision Center" where the family can communicate about specific topics being considered
- ◆ Increase family unity



Clients complete tactics on their own schedule, each in 30 minutes or less.

As tactics are completed, advisors will receive an instant notification via text or email and can view results immediately.

**INCREASE
REVENUE**

CLARITY

PREPARING
HEIRS

**SCALE YOUR
CORE BUSINESS**

ETHOS

PURPOSEFUL
BEHAVIORS

GOVERNANCE

SUCCESSION

FINANCIAL

COMMUNICATION

INDEPENDENCE

ENTITLEMENT

EMPOWERMENT

TAX SAVINGS

MAXIMIZE TIME EFFICIENCY

ELEVATE

PURPOSE

INVESTMENTS

FAMILY MEETINGS

LEGACY

STRUCTURE

ALIGNMENT

INSURANCE

ESTATE
PLANNING

BUILD MULTI-GENERATIONAL RELATIONSHIPS

ASSET PROTECTION

ELIMINATE

COMPETITION

CORE

VALUES

TRUSTED
ADVISOR

WEALTH PERPETUATION

RESPONSIBILITY

PHILANTHROPY

AWARENESS

WEALTH MANAGEMENT

SIMPLICITY AND CLARITY

RISK MITIGATION

GROW REFERRALS



LICENSING FEES

Licensing fee is **\$495 per month** and includes the following:

- ◆ 14 day free trial. You are not charged until the 14 day free trial expires.
- ◆ **Sign up as many families as you like, same monthly licensing fee**
- ◆ Train your way in only two hours: on-demand, live webinar or both
- ◆ Customized marketing brochure and presentations
- ◆ Simple, scalable structure available 24/7/365
- ◆ Ongoing technology upgrades
- ◆ Assistance from the MTM Support Team

The MTM Vault will be a **profit source for your bottom line** while providing valuable benefits to elevate your business.

Start your 14 day free trial now at MoreThanMoneyVault.com.

“The MTM Vault is easy to pick up and is unique in three very valuable ways. First, **it’s a complete system**. It’s all right in the website. Second, **it clearly shows “how to” grow your business**. Finally, it’s **comfortable to market** as you visit with existing business partners and clients.”

—Steve Legler, Consultant

YOUR ROADMAP TO ELEVATE YOUR BUSINESS: START YOUR 14 DAY FREE TRIAL TODAY.

Visit MoreThanMoneyVault.com to:

- ◆ Explore our platform
- ◆ View a demo of our system
- ◆ Sign up for our live webinar
- ◆ Learn more details in our robust, 20 question FAQ
- ◆ Download a summary of our in-depth research
- ◆ Start your **14 day free trial**

The MTM Vault will be your roadmap to offer multi-generational More Than MoneySM wealth planning in a structured, scalable digital system. Start your 14 day free trial now!

Have a question? No problem!

Email us at info@MoreThanMoneyVault.com.

"The MTM Vault has provided just what I had hoped. It has expanded our offerings in an **easy to implement technology**. It's a positive conversation with families and is well received. **It opens opportunities.** No doubt about it."

—Alan August, Consultant

About Us: The nexus of our team includes top 1% financial advisors, an attorney and an experienced group of branding, messaging, research, writing, IT and marketing experts. Our mission is to create and support an army of like-minded Professional Advisors to improve our world one family at a time.