



## IMPLEMENT THE KLONTZ MONEY SCRIPTS INVENTORY, AVAILABLE EXCLUSIVELY THROUGH DATAPOINTS



Money Scripts® are **fundamental client beliefs about money** that impact financial decisions and wellness. By identifying client Money Scripts, you can **tailor your advice and guidance** to help clients **overcome beliefs** that prevent clients from reaching critical financial goals.

Discovering and exploring Money Scripts with clients can be one of the **most important steps in achieving financial success**. Understanding core Money Scripts can help you guide clients to increase income, build net worth, and improve financial health.

Incorporate Money Scripts into your practice with DataPoints.

### DATAPOINTS MAKES IT EASY TO ASSESS & GUIDE CLIENTS

#### 1. CREATE AN ACCOUNT

Create a free, two-week trial account. Add your logo, colors, and other branding to create a seamless client experience.

#### 2. INVITE CLIENTS

Add unlimited clients to your account, and invite them to complete the test.

#### 3. REVIEW RESULTS

Review the advisor report to understand your client's Money Scripts. Share the client report and identify areas to guide clients.

### UNCOVER MONEY SCRIPTS VIA THE DATAPOINTS PLATFORM

- Access the online versions of the **Klontz Money Scripts Inventory** and the **Financial Health Scale**
- Add unlimited contacts
- Access client & advisor reports
- Create automated check-ins
- Compare spouses
- Analyze change over time

GET STARTED WITH A FREE, TWO WEEK TRIAL  
[DATAPOINTS.COM/MONEYSRIPTS](https://www.datapoints.com/moneyscripts)



## GET STARTED AND UNCOVER CLIENT MONEY-RELATED BELIEFS

### MONEY AVOIDANCE

Money is evil  
"Less is more"  
Having money = feeling guilty

### MONEY FOCUS

Money solves problems  
More money is always better  
There's never enough money

### MONEY STATUS

Self-worth = net worth  
Status symbols are a priority  
Money provides social standing

### MONEY VIGILANCE

Money should only be saved  
Handouts or help is a negative  
Working for money is noble

## START

### \$60/month per advisor

- Unlimited contacts and invitations
- Includes access to the online versions of the Klontz Money Scripts Inventory-II (KMSI-II) and the Financial Health Scale
- Advisor- and client-facing reports
- Comparisons for households

## COMPLETE

### \$120/month per advisor

Includes the Start features plus:

- Engage marketing assessments to capture leads
- Access to the Building Wealth assessment, based on *The Millionaire Next Door*
- Access to The Investor Profile - risk tolerance assessment

TRY IT FREE FOR TWO WEEKS:  
[DATAPOINTS.COM/MONEYSRIPTS](https://www.datapoints.com/moneyscripts)