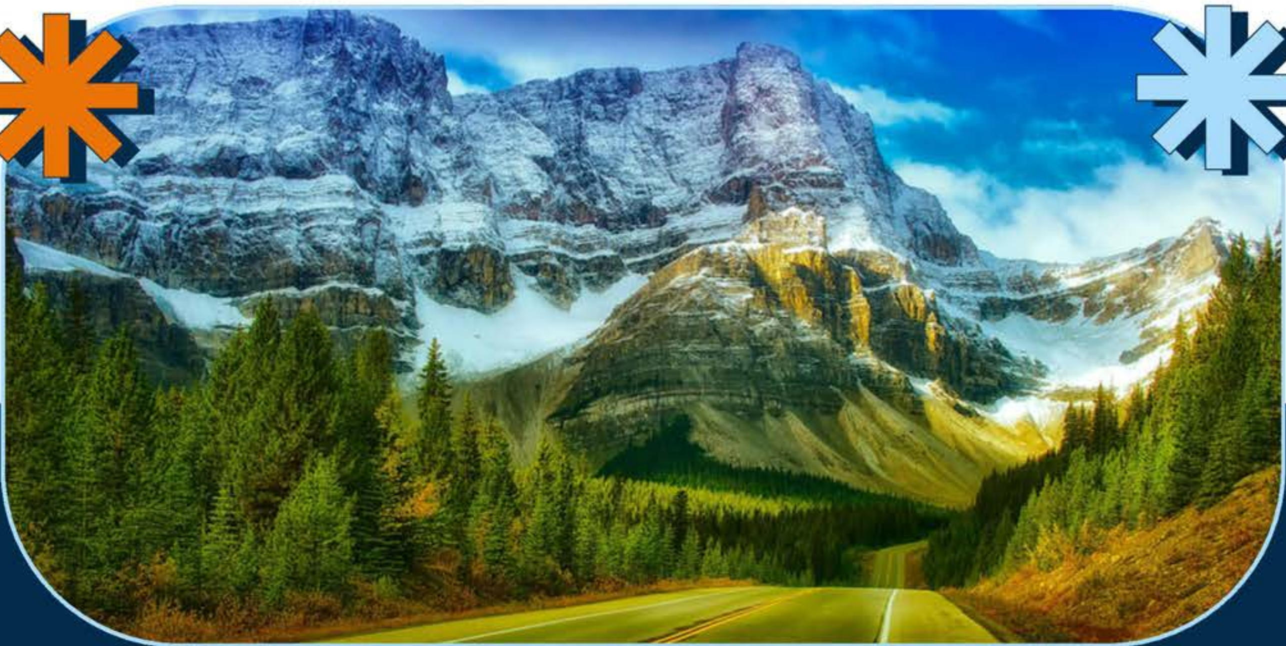
HOLISTIC WEALTH PLANNER

A PATHWAY TO PURPOSE-DRIVEN BUSINESS SUCCESS

YOUR JOURNEY



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2025

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WELCOME

Start Your Journey to Independence and Integrity.

Do you want to work with integrity, authenticity, meaning, and purpose, aligning your business with your personal values?

Do you aspire to be your own boss, shaping your future and creating a business that reflects who you truly are?

If you answered yes, then you're ready to transform from a Financial Services Pro to a successful Holistic Wealth Planner (HWP) with the Academy of Life Planning.

WHY IT MATTERS?

In today's financial landscape, the industry often prioritises product sales over genuine client needs. Many professionals feel trapped in an environment that doesn't align with their personal values. Becoming an HWP allows you to break free from traditional models, providing whole-person, life-centred planning that puts clients first and embraces a holistic approach to wealth.

WHY NOW?

The financial industry is evolving rapidly, with increasing demand for planners who prioritise well-being over products. Clients are seeking guidance from trusted professionals who understand that true wealth encompasses more than just financial assets. Now is the perfect time to step up, embrace this change, and establish yourself as a respected, independent Holistic Wealth Planner.

WHY US?

Our story began much like yours: working long hours in a system that felt disconnected from the real needs of clients. Through personal and professional growth, we discovered the importance of aligning financial planning with life planning.

This journey led us to create a new paradigm, one where we prioritise human capital and personal development as part of holistic wealth planning.

Just as we have transformed, so too can you. Our pathway follows a proven framework, inspired by the Hero's Journey, guiding you from where you are today to where you want to be. We call it the Game Plan!

WHAT WE DO?

MEMBERSHIP

MASTERCLASS

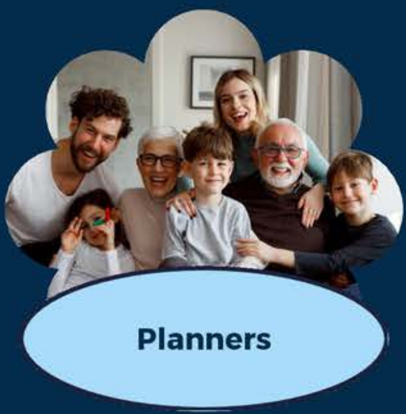
MENTORSHIP

MILESTONE

MANIFEST

MASTERY

Membership Benefits – Just £19/Month



- Extensive Financial Education Library.
- HapNav Cash Flow Tool.
- Business Planning Support.
- Skill Assessment and Development.
- Unlimited Email Q&A Support.
- Exclusive Webinars and Events.
- AI Life Planner.
- Continuous Updates and Improvements.
- Sustainable Livelihood Support.
- VOD Channel Access.
- Exclusive Tools and Exercises.
- One-to-One Mentorship (Optional).

Ready to get started? Join the Academy today and take the first step towards empowering your financial journey!

Join Now!

MEMBERSHIP

The Game Plan Evolution: CPD Masterclass Series:

- **Flexible Learning:** Choose from sessions that fit around your schedule, so you can learn at your own pace.
- **Curated Topics:** Select modules that focus on critical aspects of holistic financial planning, tailored to areas you want to develop.
- **Affordable Investment:** Join individual sessions free to members, making professional growth accessible and budget-friendly.
- **Ongoing CPD:** Complete hours of CPD, at your own pace, enhancing your skills as a Game Plan Practitioner.
- **Holistic Approach:** Dive deep into workshops that go beyond traditional financial planning, integrating life goals with financial strategies for a well-rounded client offering.

Ready to enhance your expertise? Enrol in a session today and take your holistic financial planning skills to the next level!

MASTERCLASS

Personalised One-to-One Support with Steve Conley

Our Mentorship programme offers tailored, one-to-one online support via Zoom with Steve Conley, designed to help you grow your practice and master the Game Plan process. Each session is followed by a detailed note outlining key points, action steps, and an overall plan to keep you on track.

- **Structured Guidance:** Sessions are typically scheduled every 4 weeks as part of a 12-session package. This regular cadence provides the momentum you need to develop your business effectively.
- **Flexibility for Experienced Practitioners:** Choose a meeting frequency that suits your needs—whether quarterly, half-yearly, or annually—for a customised approach.
- **Actionable Insights:** Get a combination of business development coaching and practical training on the Game Plan process, tailored to your unique goals.
- **Proven Success:** The more frequent the sessions, the faster your practice can grow. Experience shows that consistent mentorship leads to greater success and confidence in your business journey.

Ready to accelerate your progress? Book your first mentorship session and take the next step towards building a thriving, holistic financial planning practice!

MENTORSHIP

Game Plan Practitioner Accreditation Programme:

A 12-week course designed for qualified financial planners (Level-4 and above) who want to become accredited Game Plan Practitioners. This comprehensive programme equips you with the tools and skills needed to integrate life goals with financial planning, offering a holistic approach to client support.

Programme Overview:

1. 12 Weekly Modules.
2. Focus on Whole-Person Paradigm.
3. Core Learning Areas:
   - Goals and Values.
   - Talents and Passions.
   - Purpose Statement.
   - Obstacles and Action Plans.
   - Financial Forecasting.
   - Human Capital Development.
4. Comprehensive GAME Plan Report.

Certification:

- Accredited Game Plan Practitioner.

Ready to advance your career? Join the programme and become a trusted, holistic financial planner, equipped to support clients in achieving both financial success and personal fulfilment.

MILESTONE

[Accreditation & Certification]

Fast Start: White-Label eCommerce Tech Stack

Ready to launch your online business without the tech headaches? Our White-Label eCommerce Tech Stack is designed for financial planners who want to focus on clients, not coding. This scalable solution helps you create a professional online presence effortlessly, enabling you to tap into the mass market and grow your business quickly.

- **Instant Online Presence:** Get a fully branded, customisable website up and running with ease, showcasing your services and expertise without the usual tech struggles.
- **User-Friendly Platform:** No need to be a tech whiz. Our intuitive tools make it simple to build, manage, and update your site, so you can spend more time doing what you love—helping clients.
- **Seamless Client Experience:** Offer a smooth, professional online journey for your clients, from exploring your services to booking sessions and making payments.
- **Revenue Growth Made Easy:** Expand your reach, connect with a broader audience, and generate income with a streamlined eCommerce setup.

Ready to grow your business? Embrace our tech stack and unlock new opportunities for success—without the hassle.

MANIFEST

[Business-in-a-box]

Become a Holistic Wealth Planner (HWP®)

A Holistic Wealth Planner (HWP®) goes beyond traditional financial advice, focusing on the whole person rather than just their portfolio. At the Academy of Life Planning, we believe in aligning financial strategies with life goals—integrating financial planning without product recommendations and prioritising both financial and human capital development.

Why Choose the HWP® Title?
The HWP® designation is a mark of integrity, showcasing your commitment to putting clients' well-being at the heart of your practice. It sets you apart as a practitioner who prioritises long-term fulfilment, guiding clients through career transitions, wealth-building, and retirement planning without relying on product sales.

What Makes a Holistic Wealth Planner?
HWP® professionals are dedicated to empowering clients to achieve financial security and emotional well-being. By focusing on skills, abilities, and personal growth alongside traditional financial planning, you offer a truly holistic service that supports clients at every stage of life.

Ready to Elevate Your Practice?
Join a community of like-minded professionals who share your commitment to ethical, life-centred financial planning. Become a Holistic Wealth Planner and make a meaningful impact on the lives of your clients.

MASTERY
[Title & Register]

BENEFITS

Comprehensive Support

Guidance at every step of your journey, from initial membership to becoming a fully accredited HWP.

Community Access

Join a network of holistic planners dedicated to client well-being, where you can share insights and grow together.

Practical Tools and Training

Gain access to the Game Plan framework and e-commerce solutions that streamline your business operations.

Credibility and Recognition

Stand out with the HWP title and Game Plan Practitioner certification, showcasing your commitment to holistic, client-first planning.

JOIN NOW!

Ready to Begin Your Journey?

Don’t wait. Start your transformation from FS Pro to HWP today. Join our community, embrace a holistic approach to wealth, and launch a business that reflects your values and vision.

Your Call to Action:

Begin with our Membership and take the first step towards becoming a Holistic Wealth Planner. Join today, or contact us for more information on how we can support your journey.

363 professional financial planners

252 personal financial planners

5,250 in followers, 4,574 connections

264k in impressions annually

OUR REACH

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THANK YOU!

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HOPE YOU ARE INTERESTED TO JOIN.

Regulatory Information and Consumer Protection Notice:

The Academy of Life Planning Limited (AoLP) offers a range of services including generic financial advice, financial education, management consulting, coaching, training, mentorship, events management, and ongoing service support.

Our financial planning services offer generic advice and are therefore governed by general consumer law in the UK, including the Consumer Protection from Unfair Trading Regulations 2008, the Consumer Protection (Amendment) Regulations 2014, and the Digital Markets, Competition, and Consumers Act 2024. We are regulated by the Competition and Markets Authority, not the Financial Conduct Authority (FCA), because we do not provide advice relating to specific investments or carry out activities regulated under Section 22 of the Financial Services and Markets Act 2000. We do not arrange or bring about deals, make arrangements with a view to a transaction, or cause dematerialised instructions relating to any investment business. We do not advise borrowers about the liquidation of debt. Our planning services are designed as a stand-alone service. If you need financial products, you can access these directly from the market or via financial intermediaries. If you are seeking a personal recommendation for an investment product, you should consult a licensed investment adviser.

In simpler terms, we sell plans, not products.

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If you have any questions or need further information, please don't hesitate to contact us at info@aolp.co or visit www.aolp.info.