



THE GAME

FREE WEBINAR:

TUESDAY, 23RD SEPTEMBER 2025 | 12.30 TO 1.30 PM UK

The Trusted Adviser Project

Introducing the GAME Plan™

“15 years in the making”

“A structurally trustworthy
financial planning process”



Trust: What Clients Want Most

- HSBC client research:
#1 priority = Trust
- Edelman Trust Barometer: finance ranks lowest
- Disconnect: Institutions vs. clients



What's broken in financial planning today

- Portfolio > Client mindset
- Conflicts of interest
- Product sales pressure
- Opaque fees, opacity breeds suspicion



A 15-year mission

The Trusted Adviser Project

- Replace extraction with empowerment
- Remove conflicts of interest
- Shift from selling products to serving people



“Institutional Adviser” vs. “Trusted Adviser”

Introducing the GAME Plan™

- Goals • Actions • Means • Execution
- **Structurally trustworthy** framework
- One plan: Life + Financial + Human Capital



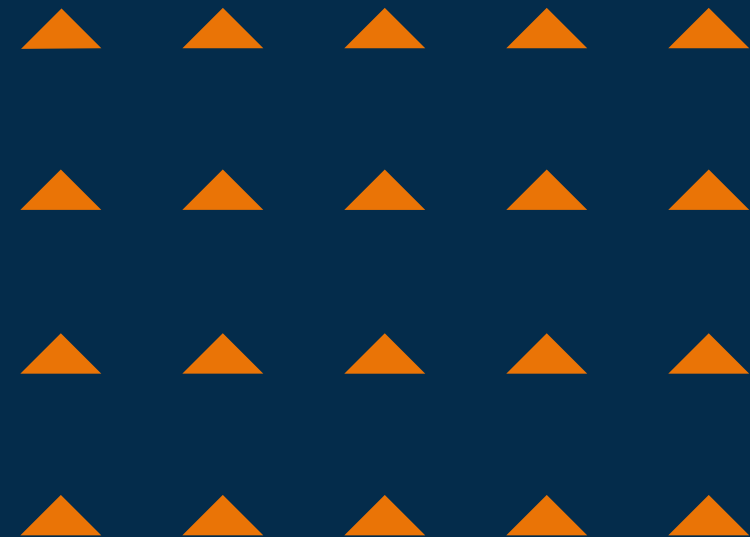
**The process that restores
trust**

The Two Cycles

Productive vs. Exhaustive



- Productive: Life first → Money aligned
- Exhaustive: Work → Pay surplus → Retirement plan later

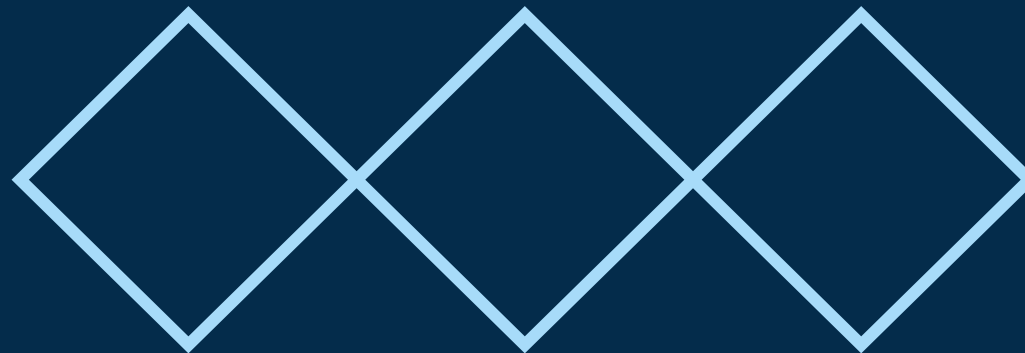


Goals

Purpose-driven planning



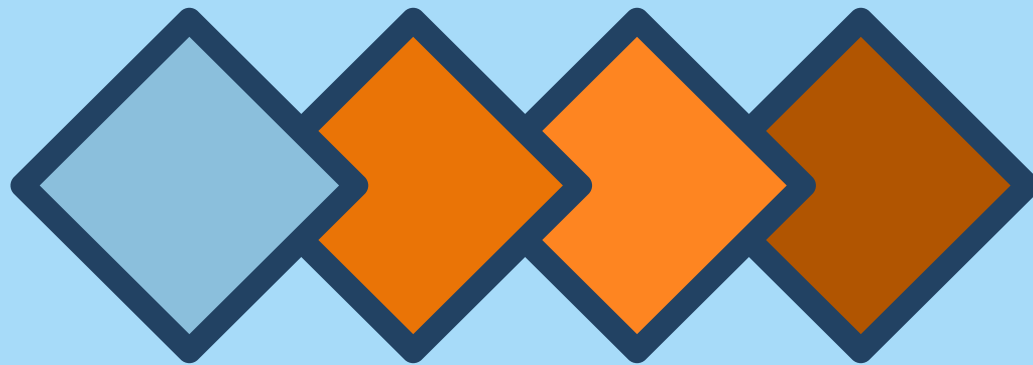
- Significant STORIES System
- Self-set goals, not adviser-driven
- Anchored in values and favourite future



Actions

The Block Buster ROADMAP

- From dream to step-by-step plan
- Remove blocks, keep the lamp lit
- Accountability built in



Means

Human + Financial Capital

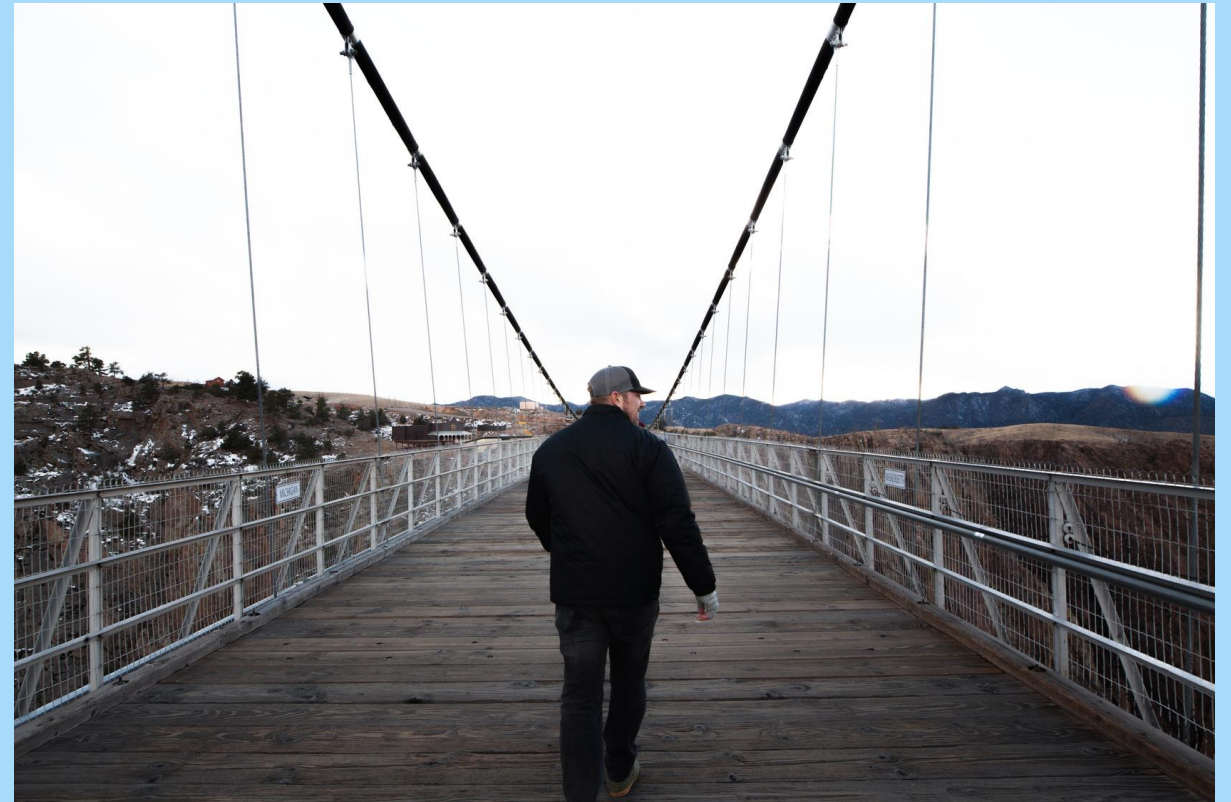
- Human capital as scaffolding
- Financial capital as support
- Integrating life liabilities into one framework



Execution

From delay to delivery

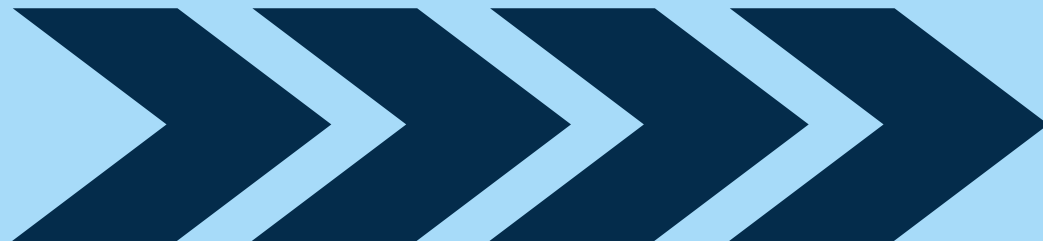
- Accountability partners
- Structural trust = no hidden conflicts
- Plans aligned to purpose, not portfolios



Why This Matters to You

For financial planners:

- Certification: GAME Plan Practitioner
- Clear, conflict-free framework
- Trusted Adviser positioning



Business Opportunity

Commercial ROI

- Rent: £395/year
- Buy: £495 lifetime
- White-label business-in-a-box: £2,750
- ROI: One client, one month



Peer Testimonials

What others say

"A true trailblazer in non-intermediated financial advice, with a genuine passion to support financial advisers on their transition journey."



Martin Turbin
(Chartered Financial
Planner)



Jörg Schlüter
(Chartered Wealth
Manager)



Richard Johnston
(Chartered Financial
Planner)

Peer Testimonials

What others say

"I completed a course on the Game Plan, and it has been immensely helpful in building my financial coaching business, with concise and well-thought-out coaching and valuable support for idea exploration."



Martin Turbin
(Chartered Financial
Planner)



Jörg Schlüter
(Chartered Wealth
Manager)



Richard Johnston
(Chartered Financial
Planner)

Peer Testimonials

What others say

"These expert planners possess extensive experience, knowledge, and unwavering integrity, making them an ideal choice for planners seeking growth and development."



Martin Turbin
(Chartered Financial
Planner)



Jörg Schlüter
(Chartered Wealth
Manager)



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(Chartered Financial
Planner)

The Bigger Mission

The Academy of Life Planning

- GAME Plan at the centre
- Movements: PML, FLC, M-POWER, Get SAFE
- Global community of trusted advisers



Next Steps

Three ways to start

1. Try the £4.99 Taster
2. Join as Certified Practitioner
3. White-label system for your firm



Trust is what clients want most

- It's time to put it back at the heart of financial planning.
- The GAME Plan makes that possible.

