



ACADEMY OF LIFE PLANNING

PROFESSIONAL PLANNER AGREEMENT

Version 13.0 – April 2026

The Academy of Life Planning Limited
9 Franklin Way, Spilsby, Lincolnshire, PE23 5GG
Company No: **08016568** | **ICO ZA502687**

PLAIN ENGLISH SUMMARY (PLEASE READ FIRST)

This section is a simple guide to help you understand the agreement before the legal terms.

What you're signing up for

- Education, mentorship, and professional development
- Tools and frameworks to build your own practice
- Support to operate independently

What this is NOT

- Not regulated financial advice
- Not investment management
- Not a done-for-you service

PAYMENTS

- Fees are paid in advance
 - Subscriptions renew automatically
 - You can cancel anytime
 - Access continues until the end of your paid period
-

CANCELLATION

- Cancel anytime via email or your account
 - No hidden lock-ins
 - No penalty fees
-

REFUNDS

- If something is not delivered properly, we will address it fairly
 - Your legal rights always apply
 - Digital programmes are generally non-refundable once accessed
-

USING THE MATERIALS

- You can use everything in your own business
 - You can apply and adapt what you learn
 - You cannot resell or copy the materials directly
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KEY THINGS TO BE AWARE OF

- This is not FCA-regulated financial advice
 - Your rights under UK consumer and advertising law still apply
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OUR COMMITMENT

If something goes wrong, we will work with you to resolve it fairly.

1. INTRODUCTION

This Agreement governs the relationship between:

The Academy of Life Planning Limited (“the Academy”, “we”, “us”)

and

You (“the Planner”, “you”, “your”)

We are a company registered in England and Wales (No. **08016568**).

Our services are **educational and developmental** and are **not regulated by the FCA**.

We do not provide regulated financial advice or handle client money.

2. OUR PHILOSOPHY

The Academy exists to restore **human agency in financial planning**.

Done by you. Done with you. Never done for you.

3. SERVICES AND PRICING

Core Packages

Package	Description	Fee
GAME Plan Practitioner Online Course	12-month online training and accreditation (rent)	£395
	Lifetime online training and accreditation (Buy)	£495
Academy Membership (Monthly)	Ongoing membership, webinars, Q&A support	£24/month
Academy Membership (Annual)	Annual membership with all member benefits	£245/year
Practice Management Circle (Monthly)	Group coaching and peer community	£99/month
Practice Management Circle (Annual)	Annual access with group coaching	£995/year
1-to-1 Mentorship +PMC (Monthly)	Monthly mentorship plan	£299/month
Remote Pathway	Online accreditation and membership	£545
Community Pathway	Online accreditation + PMC	£1,250
Standard Pathway	In person accreditation + mentorship	£2,995/year
90-day Glidepath	Fast-track accreditation + mentorship	£3,995

Package	Description	Fee
Adviser Exit Support	Clarity Analysis & Orientation Session	£750
Adviser Exit Support	Ongoing Support	£495/month
The GAME Plan Experience	6 x 90-minute sessions	£1,800
Strategy Session	AI & Total Wealth Planning	£1,995
Mentorship Meeting	One-hour Zoom meeting	£200

4. SUBSCRIPTIONS AND RENEWALS

Subscriptions renew automatically at the end of each billing period. You may cancel at any time:

- Via your account dashboard, or
- By emailing us at info@aolp.co

Cancellation is simple and does not require justification.

We will not impose barriers, retention tactics, or hidden steps to prevent cancellation.

Your access will continue until the end of your paid period.

We aim to make cancellation as easy as sign-up.

We will provide advance notice of renewal:

- At least **10 days before monthly renewals**
- At least **21 days before annual renewals**

Notices will be sent by email to your registered address.

You may cancel at any time before renewal without penalty.

5. FEES AND PAYMENT

Payment Methods

- Bank Transfer

- Stripe
- PayPal
- Invoice on request

Bank Details

Bank: Barclays

Sort Code: 20-69-85

Account Number: 33190838

REFUND POLICY

Digital content is made available immediately after purchase so you can begin without delay.

Choosing immediate access is optional.

If you prefer to retain your full cooling-off period, you may delay access until the end of that period.

Because of this, you will be asked to confirm that you wish to receive immediate access and understand that this means you will not have a right to cancel for a change of mind once access has been provided.

This allows us to provide full access instantly rather than delaying delivery.

Your statutory rights remain fully in place. If the content is faulty, not as described, or not delivered with reasonable care and skill, appropriate remedies will apply.

6. INTELLECTUAL PROPERTY

All IP remains the property of the Academy.

You may freely use, adapt, and build upon the Academy's concepts, frameworks, and methodologies in your own professional work.

You may not:

- Copy and distribute the Academy's materials in their original format (including documents, videos, or tools)
- Sell or license access to the Academy's original materials
- Republish the Academy's materials as standalone content under your own name

You are encouraged to develop your own services, frameworks, and intellectual property based on what you have learned.

7. MENTORSHIP STANDARDS

Mentorship is delivered by experienced professionals including:

- Chartered Financial Planners
- Industry practitioners

You remain responsible for your own:

- Decisions
 - Clients
 - Business
-

8. YOUR RESPONSIBILITIES

You agree to:

- Act professionally
 - Engage constructively
 - Provide accurate information
-

9. GOOD FAITH

We aim to resolve issues fairly before relying on strict legal enforcement.

10. LIMITATION OF LIABILITY

We do not guarantee outcomes that depend on factors outside our control, including:

- Your individual effort and implementation
- Your professional background and experience
- Market conditions or client demand
- Your business decisions or pricing strategy

However, we do guarantee that our services will be delivered:

- With reasonable care and skill
- In line with the description provided at the point of sale

If we fail to meet this standard, you may be entitled to remedies under UK consumer law, including repeat performance or a price reduction.

Nothing in this Agreement is intended to limit or exclude your statutory rights under UK consumer law.

11. TERMINATION

We may suspend or terminate access where there is a **reasonable and evidenced basis** that:

- This Agreement has been materially breached
- Intellectual property has been misused
- Behaviour is unlawful, abusive, harassing, or seriously disruptive to other participants
- Behaviour prevents others from reasonably participating in the service after being asked to stop

Any decision will:

- Be based on reasonable evidence
- Be proportionate to the circumstances

Before termination, we will normally:

- Notify you of the issue
- Provide an opportunity to respond or remedy the situation

We will not terminate access based on:

- Good-faith disagreement
 - Constructive criticism
 - Isolated or minor incidents
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12. DATA AND PRIVACY

We comply with UK GDPR and only use data to deliver services and communication.

13. GOVERNING LAW

England and Wales.

14. FAIR TREATMENT PRINCIPLE

We are committed to treating all members fairly and acting reasonably in the application of this Agreement.

Any discretion we exercise will be applied proportionately and in good faith.

This Agreement is intended to be fair, transparent, and supportive of your development.

We do not rely on hidden terms, technicalities, or restrictive practices.

If anything is unclear, we encourage you to ask before proceeding.

15. ACCEPTANCE

This Agreement is designed to be fair, transparent, and supportive of your development as an independent practitioner.

It protects both your rights and the integrity of the Academy's work.

If any term feels unclear or unreasonable, we encourage you to raise it with us before proceeding.

By signing or making payment, you confirm:

- You have read and understood this Agreement
- You accept the nature of the services
- You understand they are unregulated and educational

Client Name: _____

Signature: _____

Date: _____

Signed for and on behalf of The Academy of Life Planning Limited

Steve Conley

Founder & CEO

Signature: _____

Date: _____