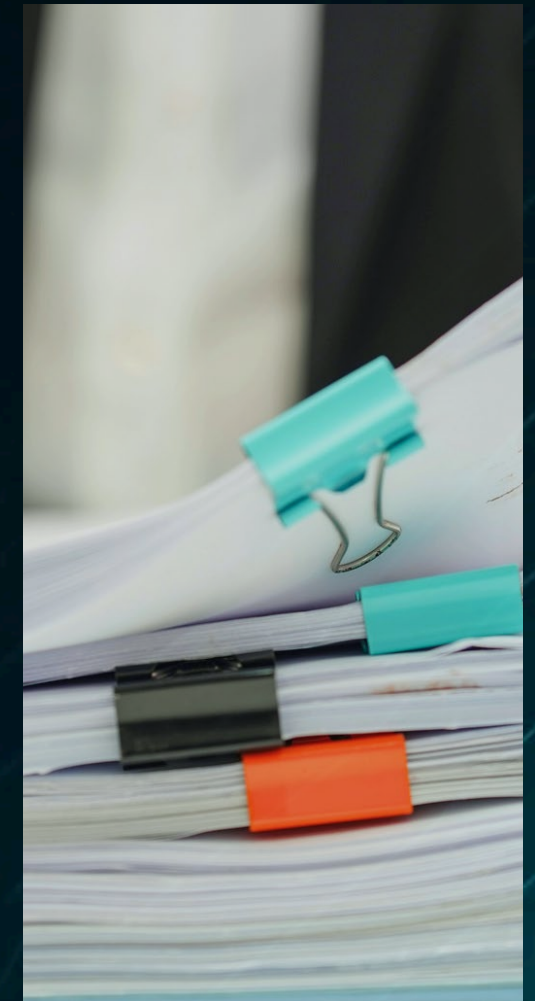


The gap in a planner's service

Families need someone to join up the whole picture.

Around £3m in family wealth can bring multiple generations, structures and professionals, with nobody coordinating them.

Planners need a viable service that recognises complexity while keeping specialist work with the right professionals.



The planner as the family's Control Tower

Recognition before structuring

Recognise complexity. Coordinate professionals.
Record decisions. Escalate only when needed.

The family stays in charge, with its own plan in the TFO app.
The professional bench handles technical advice and execution.



What the programme includes

11 modules across Foundations, Recognition and Practice

Recorded learning and live case workshops
Mentoring and the TFO app throughout
Recognition Pack and tools for client deliverables
A capstone onboarding one family



Accreditation route: assessment and a place on the Academy's find-a-planner page.

The pilot and launch timeline

- **01 Prepare** — Finalise materials, specialist checks and app updates
- **02 Pilot** — About eight weeks of live sessions, one family per planner
- **03 Build** — Turn pilot recordings into modules and finish assessments
- **04 Launch** — Open the recorded route and accreditation cohorts

Launch follows readiness gates. No paid cohort starts before practitioner mode and independent checks. Pilot dates and session schedule: tbc.

The price for working-group testers

Free pilot

TFO app access

£4.99 a month per person
or £25 a month for six family passes

After testing

Recorded route £495

Accreditation route £2,495

Licence renewal £25 a year

Pilot app charges, VAT treatment and payment terms: not specified.

Family service fees will be tested during the pilot.

The tester's next step

Pilot participation means onboarding one family

Entry: accredited TWP Practitioner and Academy member, with a mentor, own professional indemnity insurance and ICO registration.

Planners and families complete the pilot feedback template.
The pilot tests the service and what families will pay.

Sign-up route, contact and deadline: tbc

