



## ACADEMY OF LIFE PLANNING PROFESSIONAL PLANNER AGREEMENT

Version 12.0 – February 2026

The Academy of Life Planning Limited | 9 Franklin Way, Spilsby, Lincolnshire, UK, PE23 5GG

### 1. INTRODUCTION

This Agreement governs the relationship between The Academy of Life Planning Limited (“the Academy”, “us”, “we”, “our”) and you (“the Planner”, “you”, “your”) as a professional member and/or accredited practitioner. The Academy provides unregulated holistic wealth planning education, mentorship, and professional development services. We are a company registered in England and Wales (No. 8016568). Our services are not regulated by the FCA.

### 2. PROPOSITION

The Academy of Life Planning (AoLP) empowers planners to deliver ethical, transparent, and holistic wealth planning services using our GAME Plan™ framework. We offer professional training, mentorship, membership, and business development support.

### 3. SERVICE PACKAGES AND PRICING

Our current service packages and pricing are as follows:

Package	Description	Fee
GAME Plan Practitioner Online Course	12-month online training and accreditation	£395
Academy Membership (Monthly)	Ongoing membership, webinars, Q&A support	£24/month
Academy Membership (Annual)	Annual membership with all member benefits	£245/year
Peer Mentorship + Membership (Monthly)	Group coaching and peer community	£29/month
Peer Mentorship + Membership (Annual)	Annual access with group coaching	£295/year
1 Hour 1-to-1 Mentorship +	Personal mentorship and	£34/month

Membership (Monthly)	membership	
1 Hour 1-to-1 Mentorship + Membership (Annual)	Annual mentorship and membership	£345/year
2 Hours 1-to-1 Mentorship + Membership (Monthly)	6-monthly mentorship	£44/month
2 Hours 1-to-1 Mentorship + Membership (Annual)	Annual 6-monthly mentorship	£445/year
4 Hours 1-to-1 Mentorship + Membership (Monthly)	Quarterly mentorship	£64/month
4 Hours 1-to-1 Mentorship + Membership (Annual)	Annual quarterly mentorship	£645/year
12 Hours 1-to-1 Mentorship + Membership (Monthly)	Monthly mentorship plan	£144/month
12 Hours 1-to-1 Mentorship + Membership (Annual)	Annual monthly mentorship	£1,445/year
Fast-Track Upgrade (Peer/Mentees Only)	6 x 90-minute sessions over 12 weeks	£1,350
Fast-Track + 9 Mentor Hours + Membership	Accreditation plus 9 hours mentorship	£2,345
Elite Planner Accelerator Programme	90-day business-in-a-box programme	£4,150
Optional e-Commerce Web Maintenance (Monthly)	Ongoing system, CRM, SEO support	£50/month
Optional e-Commerce Web Maintenance (Annual)	Annual maintenance support	£500/year

#### 4. SUMMARY OF TERMS

- Services are unregulated holistic wealth planning education and mentorship.
- Subscriptions renew automatically each month or year.
- You may cancel anytime; access remains until the end of the paid period.
- Fees are fixed, payable in advance, and non-refundable except as required by law.
- We do not handle client money or regulated investments.
- Additional mentorship sessions may be purchased for £100/hour.

## 5. TERMS OF BUSINESS

This Agreement takes effect upon your acceptance and payment. The Academy will provide the agreed services professionally, with reasonable care and skill. You agree to provide accurate information as required to support your learning, accreditation, or mentorship. All intellectual property, including the GAME Plan™ and HapNav™, remains the property of the Academy. Use of these materials is licensed for personal and professional application only and may not be reproduced or sold.

## 6. ACCEPTANCE & PAYMENT

By signing this Agreement or proceeding with payment, you acknowledge that you have read, understood, and accepted these terms. You confirm awareness that services are unregulated, educational in nature, and provided by The Academy of Life Planning Ltd.

Payment Methods: Bank Transfer, Stripe, Wix, or Invoice on Request.

Bank: Barclays | Sort Code: 20-69-85 | Account Number: 33190838

Client Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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

Stephen James Conley, Founder & CEO

Signature: \_\_\_\_\_

Date: \_\_\_\_\_