HOLISTIC WEALTH PLANNER

A PATHWAY TO PURPOSE-DRIVEN BUSINESS SUCCESS

YOUR JOURNEY

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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

Professionals

Planners

- 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 Mentorship with Steve Conley

Take your financial planning practice to the next level with tailored, one-to-one mentorship from Steve Conley. Delivered online via Zoom, this programme is designed to give you personalised guidance, actionable insights, and the support you need to succeed.

What You'll Get:

- **Structured Support: Sessions are held every 4 weeks as part of a 12-session package, giving you the momentum to grow your business step by step.**
- **Tailored Flexibility: For experienced practitioners, sessions can be scheduled monthly or quarterly to suit your unique needs.**
- **Actionable Coaching: Each session blends business development coaching with practical training on mastering the Game Plan process, all tailored to your goals.**
- **Proven Results: Regular sessions lead to faster growth, greater confidence, and a thriving practice.**

Peer Mentorship

In addition to one-to-one support, you'll have access to our Monthly Mentorship Clinics on the first Monday of every month at 10 am. Share experiences, gain insights, and be part of a supportive community of like-minded professionals.

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

Launch your financial planning business online without the tech headaches. Our White-Label eCommerce Tech Stack is a scalable, user-friendly solution designed to help you create a professional online presence effortlessly, so you can focus on what matters most—serving your clients.

Key Benefits:

- Instant Online Presence: A fully branded, customisable website that showcases your services and expertise, up and running with ease.
- User-Friendly Platform: No tech skills needed. Simple tools make it easy to build, manage, and update your site so you can focus on helping clients.
- Seamless Client Experience: Provide a smooth online journey for your clients, from exploring services to booking sessions and making payments.
- Revenue Growth Made Easy: Expand your reach, connect with a wider audience, and generate income with a streamlined eCommerce setup.
- Comprehensive Start-Up Support: Includes proposition and brand design, back-office advice on loading videos, courses, blogs, and groups, plus help with email, CRM, SEO, analytics, and liaising with your admin team.

Ready to grow your business? Embrace our tech stack and unlock new opportunities for success—quickly and hassle-free. Let's get started!

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.

386 professional financial planners

259 personal financial planners

5,499 LN followers, 4,714 connections

333k LN 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:

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