The GAME Plan

Your Path to Financial Success.

2025

The Academy of Life Planning Limited

www.aolp.shop

Introduction

Embarking on a Transformative Financial Journey with the Academy of Life Planning

Discover the Academy of Life Planning, where financial guidance meets personal growth. Our philosophy is rooted in equipping you with honest, ethical financial strategies that are customised to suit your distinct life journey. Let us come together and revolutionise financial planning, expanding beyond conventional limits to embrace a holistic approach to well-being.

Vision for Democratising Financial Planning: Accessible, Ethical, Empowering

At the Academy of Life Planning, our vision is to transform the landscape of financial planning into a realm that's accessible to everyone, regardless of their economic background. We believe in breaking down the barriers that traditionally restrict financial planning to a privileged few. Our mission is to infuse the industry with transparency and integrity, ensuring that every individual has the opportunity to access high-quality, ethical financial planning.

We're dedicated to challenging and changing the entrenched norms that often lead to financial exploitation. By promoting education and empowerment, we aim to equip individuals with the knowledge and tools they need to take charge of their financial futures. Our approach is about more than just numbers; it's about understanding and aligning one's financial decisions with one's overall life goals, values, and aspirations.

In pursuit of this vision, we offer a range of services and resources designed to make financial planning more inclusive. From our 'Planning My Life' initiative, which provides a comprehensive approach for those who wish to become their own financial planners, to our 'Financial Life Coach' services for those in need of expert guidance, we cater to a diverse audience. Each service is tailored to demystify the financial planning process, making it understandable, relatable, and achievable for all.

Moreover, we're building a global community of non-intermediating financial planners who share our ethos. This network not only fosters professional growth and collaboration but also extends our reach, ensuring that more people can benefit from our vision of democratised financial planning.

Through these efforts, the Academy of Life Planning is not just offering services; we're leading a movement. A movement towards a world where financial well-being is interwoven with personal fulfillment, social responsibility, and spiritual growth, crafting a sustainable legacy for generations to come.

The GAME Plan is a holistic approach to achieving financial and life goals, designed to empower and inspire. It comprises four key elements:

Each principle is integral to constructing a life and financial plan that aligns with personal values and aspirations, ensuring a balanced and fulfilling journey.

Navigating Your Financial Path with a GAME Planner

Embarking on a journey with a GAME Planner at the Academy of Life Planning is more than just a step towards financial security; it's a leap towards a life of purpose and fulfilment. Here's how our GAME Planners can make a significant difference:

- **Tailored Guidance:** Our planners deeply understand that everyone's life script is unique. They provide generic financial planning advice, tailored to align your financial plans with your life goals.
- **Holistic Approach:** We go beyond numbers. Our planners integrate your financial goals with your personal values, dreams, and life stages, ensuring a well-rounded approach to your financial well-being.
- **Empowerment Through Education:** Knowledge is power. Our planners equip you with the understanding and tools necessary to make informed decisions, fostering long-term financial independence.
- **Ethical and Transparent Practices:** Integrity is at our core. We ensure transparent, unbiased advice, free from conflicts of interest, fostering a relationship built on trust and mutual respect.
- **Ongoing Support and Adaptability:** Life is dynamic, and so are your plans. Our GAME Planners provide continuous support and adapt strategies to suit your evolving life circumstances.
- **Community Involvement:** By choosing us, you're part of a larger movement towards socially responsible and sustainable financial planning practices.

*"**Expert, unbiased, value-adding life & financial planning:** From start to finish, Steve @ AoLP has provided an outstanding service and experience. From the exploration and development of our life plan to the detailed and comprehensive cash flow modelling and financial strategy development, Steve has been great. Would highly recommend as a critical value-adding, value-for-money service - transparent fixed fees in exchange for unbiased, expect and actionable advice. Excellent." - Ian Martin, Chair of the Board of Trustees, World in Need International.*

A Holistic, Client-Centred Approach to Financial Empowerment.

At the Academy of Life Planning, we embrace a philosophy that transcends traditional financial planning. Our approach is deeply holistic, integrating your financial goals with personal aspirations, values, and well-being.

- **Understanding the Individual:** Every journey begins with a conversation. We take the time to understand you - not just your finances but your dreams, challenges, and life circumstances. This depth of understanding is the foundation of our personalised planning.
- **Integrating Life and Financial Planning:** We believe in the inseparable connection between life goals and financial strategies. Our planning process aligns your financial decisions with your life's objectives, ensuring each step taken is a step towards your overall vision.
- **Empowering Through Education:** Knowledge leads to empowerment. We provide the tools and insights necessary for you to understand and navigate the financial landscape confidently. This education empowers you to make informed decisions that resonate with your life's journey.
- **Adaptable Strategies for a Dynamic Life:** Life is ever-changing, and so are your needs. Our strategies are designed to be flexible, adapting to your evolving circumstances, ensuring that your financial plan remains relevant and effective.
- **Ongoing Partnership and Support:** Financial planning with us is a journey, not a one-time event. We offer ongoing support and guidance, adjusting as your life unfolds, celebrating your successes, and navigating challenges together.
- **Commitment to Transparency and Integrity:** Trust is paramount. We operate with the highest standards of integrity and transparency, ensuring that your best interests are at the heart of everything we do.

Our approach isn't just about financial success; it's about crafting a life rich in purpose and meaning, where financial decisions support your broader life goals. By focusing on you as a whole person, we create a path that leads not only to financial security but to a life of fulfilment and joy.

THE GAME Plan

GOALS

The Significant STORIES System

Define what would be your values-driven and purpose-driven favourite future. Know what you are good at and what you love to do, have and be. Express your goal as an inspiring purpose statement. Think mind, body, heart and spirit.

1

ACTIONS

2

The Blockbuster ROADMAP.

Remind yourself of your favourite next chapter. Ask yourself, what could be stopping me? List your obstacles. Then brainstorm a list of actions to overcome each obstacle. The result is your action plan. Remind yourself of the outcome that is now achievable and that you deserve.

3

MEANS

The FinancialFREEDOM Forecaster.

Create a base plan on HapNav of everything you earn, spend, own and owe. Set up a what-if scenario for your favourite future. Do you have enough? If not, use the Ikigai Proposition framework to add what the world needs and will pay for. Create the business plan of you.

4

EXECUTION

The Stand & DELIVER Game Giver.

Pull together your purpose statement, action plan, financial plan and business plan into the GAME Plan. Start to test your actions and adjust and expand where necessary. Track your progress. Revisit the GAME Plan repeatedly.

Empowering Services Offered at the Academy of Life Planning

At the Academy of Life Planning, we are committed to a unique approach in financial planning. Our services are tailored to empower you, offering guidance and education rather than selling financial products. Here's how we can assist you on your financial journey:

- **Financial Life Planning:** Our bespoke service focuses on aligning your personal goals with financial strategies. We guide you through life transitions, planning for retirement, or creating a purposeful financial future, always placing your interests first.
- **Education and Empowerment in Wealth Management:** We provide the knowledge and tools to help you understand and manage your wealth. Our guidance includes insights into investment principles, asset allocation, and risk management, tailored to your values and explaining risk tolerance.
- **Estate Planning and Inheritance Strategies:** Our role is to educate and assist you in creating an effective estate plan, ensuring your legacy aligns with your wishes, while guiding you through efficient tax planning strategies.
- **Retirement Planning Guidance:** We help you understand and plan for a secure financial future in retirement, offering insights into pensions, lifetime allowances, and sustainable financial practices.
- **Insurance and Protection Planning:** We provide information and guidance on how to protect yourself and your loved ones, covering areas like life insurance, income protection, and critical illness planning.
- **Financial Education Resources:** Access our comprehensive range of educational materials, workshops, and seminars, empowering you to make informed financial decisions.
- **Tools for Financial Planning:** Utilise our innovative online tools and calculators to gain insights into your financial scenarios, aiding in better planning and understanding of your financial landscape.
- **Personal and Business Financial Strategy Development:** Whether personal or business-related, we provide strategy development services, equipping you with the knowledge to make informed decisions in both arenas.
- **Guidance on Sustainable and Ethical Investment Choices:** We offer information on how to invest in a manner that aligns with your ethical values and contributes to positive societal and environmental impact.
- **Continuous Empowerment and Support:** We provide ongoing support and regular reviews, ensuring your financial strategy remains in tune with your life's changes, empowering you to take charge of your financial future.

At the Academy of Life Planning, our aim is not to sell but to educate and empower. We stand as professionals on your side, guiding you to make informed decisions and engage actively with your finances for better, more personalised solutions.

Planning My .Life

Planning My Life: Empowering You to Architect Your Future

£19 / month

Planning My Life is a groundbreaking service revolutionising the way individuals approach their lives and finances. It's a journey towards empowerment, clarity, and control over one's future.

At the heart of 'Planning My Life' lies the innovative AI Life Planner, a tool designed to guide users in crafting personalised life plans. This technology offers a clear path forward, illuminating the way towards achieving your life's goals and financial aspirations.

The service's core mission is to make financial planning and personal growth democratic, accessible, and transparent. It's about decentralising control, giving you the ownership of your data and assets, thus breaking away from traditional institutional constraints.

For a subscription fee of just £19 per month, members unlock access to an extensive array of resources. This includes a rich library of planning tools, engaging videos, and a vibrant community of forward-thinking planners. Additionally, members benefit from unlimited Q&A email support from industry experts, along with valuable insights directly from Steve Conley himself.

The guiding values of 'Planning My Life' - empowerment, integrity, innovation, community, personal growth, and decentralisation - are not just principles; they are the pillars upon which every service and interaction is built. These values influence every decision, shaping a unique and transformative experience for each client.

Beyond individual empowerment, 'Planning My Life' embraces a global vision. It recognises its potential role in contributing to the end of world poverty, aligning its objectives with broader humanitarian goals.

This service stands out for its commitment to delivering genuine value without relying on gimmicks. By focusing on a straightforward paid membership model, 'Planning My Life' is redefining the landscape of financial planning to be more inclusive, empowering, and life-changing.

'Planning My Life' is more than just a service - it's a movement, a philosophy, a commitment to enabling a fulfilling and successful life for everyone. Join us in this community that's not only shaping the future but also unlocking potential and transforming lives daily.

One-to-one

Transforming Cashflow into Life's Opportunities with 'The Financial Life Coach'

Welcome to 'The Financial Life Coach', a vital facet of the Academy of Life Planning. Here, we specialise in transforming your financial flow into a springboard for life's opportunities. We don't act as financial intermediaries; our role is to be your unbiased financial companions, steering you through the complexities of your financial landscape.

Our Services:

- **Self-Directed & Collaborative Planning:** Embrace independence with our low-cost planning tool, HapNav, or choose collaborative guidance. For those seeking a more in-depth journey, **Voyant** offers advanced, planner-assisted strategies, enriching your financial planning experience.
- **Comprehensive Financial Solutions:** Whether it's navigating investments, retirement, or estate planning, we provide comprehensive solutions. If your journey involves regulated investments, we empower you with coaching for a DIY approach or guide you towards appropriate wealth managers for your specific needs.

Our Unique Approach: One-to-one Financial Planning, Without the Product Sales.

- **Inclusive Strategy:** Our doors are open to everyone, regardless of the size of investment assets. Our inclusive approach caters to those managing smaller sums, those who prefer self-direction, and those dealing with non-regulated assets such as properties and international investments.
- **Innovative Framework:** Leveraging our unique Ikigai proposition, we delve deeper than traditional cashflow management. We focus on generating new financial streams, offering a holistic perspective that is a rarity in conventional financial advisories.
- **Asset Strategising & Liability Forecasting:** Our expertise in forecasting and strategising enables us to transform your financial aspirations into tangible, executable plans.

As 'The Financial Life Coach,' we are redefining the essence of financial planning. It's about creating a service that is inclusive, empowering, and geared towards financial clarity and mastery. For a journey that turns your cashflow into opportunities and your financial dreams into realities, visit www.finlife.coach.

"Steve Conley, is on a mission to change the advice landscape and I don't write these words lightly."

Brett Davidson, Founder FP Advance

"Thank you, especially, Steve Conley, for your knowledge and support, and for everything you do to promote financial wellbeing."

Robin Powell, Journalist & Author

"Don't have any idea about implementation or how, but you really should be running one of these banks. You're a man of immense vision, with knowledge of all the pieces and pockets of community and profit that are necessary to make a bank thrive. You understand things quickly and make things happen. But most of all you see into the future, much as Steve Jobs did, and are as passionate and dedicated to making an organisation both 'aesthetically beautiful' and brilliantly profitable, understanding that the key is the customer, delivering something of magnificent value for them. There aren't many like you, and if this is your career, you should be at the top."

George Kinder, Founder of the Kinder Institute.

Success Stories

Join Our Global Community: Support, Growth, and Collaboration

At the Academy of Life Planning, we believe in the power of community. Our global network is more than just a collection of individuals; it's a vibrant, supportive, and collaborative environment where ideas, experiences, and knowledge are shared.

Nurturing a Global Network: Our community spans across continents, encompassing a diverse group of financial life planners, clients, and industry experts. This global reach provides a rich tapestry of perspectives, fostering an inclusive and insightful environment for all members.

Collaboration and Support: The cornerstone of our community is the unwavering support and collaboration among members. Whether it's through our online forums, virtual meetups, or live events, we provide numerous opportunities for members to connect, share experiences, and offer mutual support.

Continuous Learning and Development: Education is central to our ethos. We offer a range of webinars, workshops, and training sessions, led by industry experts and thought leaders. These educational initiatives are designed to keep our community informed, empowered, and at the forefront of financial planning innovation.

Shared Values and Vision: Our community is bound by shared values of integrity, transparency, and empowerment. Together, we are committed to redefining financial planning to be more ethical, inclusive, and client-focused.

Making a Global Impact: The Academy's vision extends beyond individual financial success. Our collective efforts contribute to broader societal changes, aligning with global initiatives and humanitarian goals.

Accessible Support: Our support network is always accessible. From expert advice to peer-to-peer guidance, we ensure that every member of our community feels supported and valued.

Join us at the Academy of Life Planning, and be part of a community that's shaping the future of financial planning. Together, we are not just planning finances; we are planning lives, making a meaningful impact on a global scale.

Empower Your Financial Journey with Our Educational Resources and Tools

At the Academy of Life Planning, we are passionate about empowering you with knowledge. Our comprehensive suite of educational materials and tools is designed to demystify financial planning and enrich your understanding, allowing you to take control of your financial future confidently.

Wide Range of Educational Materials: Our library is stocked with an extensive selection of resources. From in-depth articles and eBooks to informative videos and podcasts, we cover various topics crucial to financial and life planning. Whether you're a beginner or looking to deepen your understanding, our materials cater to all levels.

Innovative Tools for Planning and Analysis: Our range of online tools, including financial calculators, forecasting models, and budgeting aids, are designed to give you practical insights into your financial situation. These tools help you visualise different scenarios and make informed decisions about your financial strategy.

Interactive Workshops and Webinars: We host regular workshops and webinars led by industry experts and thought leaders. These sessions provide interactive learning experiences, covering the latest trends, strategies, and insights in financial planning.

Community-Led Learning: Our global community plays a pivotal role in our educational offerings. Through forums and discussion groups, members can share experiences, ask questions, and learn from each other, fostering a collaborative learning environment.

Customised Learning Paths: Recognising that each individual's learning needs are unique, we offer customised learning paths. These tailored programmes ensure that you receive the information most relevant to your specific financial and life planning goals.

Continuous Updates and Improvements: Our commitment to education is ongoing. We continuously update and expand our resources and tools to ensure they remain current, accurate, and aligned with the latest financial planning practices.

Empowerment through education is at the core of the Academy of Life Planning. We invite you to explore our resources and tools and embark on a learning journey that will transform your approach to financial planning and life management.

The 12-Hour GAME Plan to Success.

01 Goals

HOUR

Personal Values Assessment. To live with integrity is to live life true to ones self. The output is a Character Statement.

02 Purpose

HOUR

Talents assessment. Diagnostic of our productive assets. Our purpose is to use these assets in service to others. The output is a purpose assessment.

03 Passions

HOUR

What is your favourite future? Looking at your needs, wants, and passions. The output is to identify the life you love.

04 Statement

HOUR

We pull together your values, what you are good at, and what you love to do, to create a vision statement for your lifetime liability forecast.

Hour-by-hour breakdown of the programme.

05 Obstacles

HOUR

We identify the obstacles that are preventing you from achieving your goals.

06 Actions

HOUR

We identify the actions to overcome obstacles. The output is an action plan.

07 Means

HOUR

We complete an asset audit, intangible and tangible. We produce a base-line cashflow forecast to assess whether you risk outliving your capital.

08 What-if

HOUR

We look at asset strategies under various what-if scenarios to put the financial architecture in place to support your favourite future.

Hour-by-hour breakdown of the programme.

09

Develop

HOUR

Where there are insufficient incomes and assets we create them, with the Ikigai Proposition Development Framework.

10

Plan

HOUR

We complete the favourite future cashflow forecast. The output is a financial plan (and business plan where appropriate).

11

Execution

HOUR

We realign our actions to our path of purpose, implementing, and developing our asset strategies.

12

Review

HOUR

We track progress against our values-led, purpose-driven plan, living longer better. Review. Repeat.

Hour-by-hour breakdown of the programme.

Unlocking Potential: Membership and Mentorship at the Academy

Joining the Academy of Life Planning isn't just about accessing services; it's about becoming part of a movement dedicated to transforming financial planning and personal growth.

Our membership and mentorship programmes are pillars of this transformation, offering unparalleled support, education, and community engagement.

Membership Benefits:

1. **Comprehensive Resource Access:** Members receive full access to our extensive library of financial planning tools, educational content, and innovative planning software. This includes exclusive materials not available to non-members.
2. **Exclusive Workshops and Webinars:** Engage in members-only workshops and webinars led by industry experts, covering advanced financial planning topics and personal development strategies.
3. **Global Community Network:** Connect with a diverse, global network of financial life planners and like-minded individuals. This community is a hub for sharing experiences, insights, and support.
4. **Regular Updates and Insights:** Stay informed with regular newsletters, updates, and insights from industry leaders, including thought-provoking articles and the latest trends in financial planning.
5. **Discounts on Events and Services:** Enjoy exclusive member discounts on various Academy events, services, and partner offerings.

Personalised Mentorship:

Engage in one-on-one mentorship with experienced financial life planners. This personalised guidance is tailored to your needs, whether you're a client seeking financial clarity or a planner aiming for professional growth.

Personal Development and Support: Our mentorship programme offers personal development support, helping you navigate life, develop your skills, and expand your network.

Tailored Learning Pathways: Based on your goals and interests, we create customised learning and development pathways, ensuring that your mentorship experience is directly aligned with your personal and professional aspirations.

Ongoing Support and Accountability: Our mentors provide ongoing support, encouragement, and accountability, helping you stay on track with your financial and life goals.

Access to a Wealth of Experience: Tap into the wealth of knowledge and experience of our mentors, gaining insights and guidance that can only come from seasoned professionals.

At the Academy of Life Planning, our membership and mentorship services are more than benefits; they're gateways to empowerment, growth, and a fulfilling journey towards financial well-being and life mastery.

Embrace this opportunity to align your financial journey with your deepest values and aspirations

Coaching

At the Academy of Life Planning, we take great pride in our personalised coaching approach.

Each coaching session is a bespoke experience, meticulously tailored to the individual's unique financial and life circumstances. Our coaches are not just advisors; they are empathetic allies who listen intently, understand deeply, and guide wisely. They work closely with you to uncover your true aspirations, align your financial strategies with your life goals, and navigate the complexities of your personal journey. This one-on-one coaching transcends traditional financial guidance, offering a transformative experience that empowers you to make informed decisions and achieve a harmonious balance in both your financial and personal life. It's not just about reaching financial milestones; it's about crafting a fulfilling life journey, guided every step of the way by a coach who genuinely understands and cares about your success.

Privacy

Your Trust, Our Commitment: Privacy and Security at the Academy

At the Academy of Life Planning, your privacy and security are paramount. We employ robust measures to protect your personal and financial information, adhering to stringent data protection laws. Our digital platforms are secured with the latest encryption technologies, ensuring that your data remains confidential and safe. We pledge transparency in all our processes, building a foundation of trust and integrity. Your peace of mind is our priority, as we create a safe space for your financial journey.

Creating a Positive Ripple: Our Global Impact

The Academy of Life Planning has a far-reaching global impact, with a presence in numerous countries. Our global community brings together diverse perspectives, enriching our understanding and approach to financial life planning. We're committed to making a meaningful difference worldwide, contributing to financial literacy and empowerment across continents.

Our vision extends to aiding humanitarian causes, aligning our financial expertise with global social responsibility..

Our vision at the Academy is to lead a global movement in ethical, transparent, and empowering financial planning. We aspire to be at the forefront of financial education and innovation, continually expanding our reach and impact. Our goal is to empower individuals worldwide to achieve financial independence and well-being, contributing to a world where financial knowledge is a universal right, not a privilege

"Exactly what I was looking for!

I was referred to Steve Conley by the author of a fairly well known book in personal investment. After a lot of reading I had formed the view that I was paying a financial advisor fairly large fees unnecessarily. I wanted to take the leap to self investing but there were all sorts of blind alleys and little nagging questions holding me back. I also needed a sense check and the confidence that my plan was reasonable. At my meeting with Steve I got all of that and more. Absolutely worth the fee. I then signed up for the AoLP subscription and obtained access to a huge library of resources as well as a fantastic bottomless email service."

- PAUL Brown, January 2024, about Planning My Life.

Summary

Be Part of the Change: Join Us

Embark on a transformative journey with the Academy of Life Planning. Join us in our mission to redefine financial planning and personal growth. Become a part of a community that values integrity, empowerment, and global impact.

Together, we can create a future where financial well-being is accessible to all. Start your journey today and be the architect of your financial destiny.

Next Steps

Book a Discovery Meeting

Experience transformative financial guidance in a one-hour Zoom meeting with expert Steve Conley.

Tailored to your aspirations, this session offers personalised insights, flexible scheduling, and the opportunity for in-depth queries.

Benefit from a 50% discounted rate, ensuring valuable advice for shaping your financial future.

Book now for expert-led empowerment.

Price: £100.

www.aolp.shop

Stay Connected!

Contact Us Today!

Join our movement...

The Academy of Life Planning is the world's first generic financial planning network.

www.aolp.shop

www.planningmy.life

www.finlife.coach

info@aolp.co.uk

Thank You!

www.aolp.shop

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Our financial planning services offer generic advice and are therefore governed by general consumer law in the UK, including the Consumer Protection from Unfair Trading Regulations 2008 and the Consumer Protection (Amendment) Regulations 2014. We are regulated by the Competition and Markets Authority, not the Financial Conduct Authority (FCA), because we do not provide advice relating to specific investments or carry out activities regulated under Section 22 of the Financial Services and Markets Act 2000. We do not arrange or bring about deals, make arrangements with a view to a transaction, or cause dematerialised instructions relating to any investment business. We do not advise borrowers about the liquidation of debt. Our planning services are designed as a stand-alone service. If you need financial products, you can access these directly from the market or via financial intermediaries. If you are seeking a personal recommendation for an investment product, you should consult a licensed investment adviser.

In simpler terms, we sell plans, not products.

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