



## Customer Contract for Life Planning Services

This Customer Contract (the "Agreement") is entered into between The Academy of Life Planning Limited (referred to as "the Provider") and the customer (referred to as "the Client") for the provision of life planning services. By engaging in the services provided by the Provider, the Client agrees to be bound by the terms and conditions outlined in this Agreement.

### 1. Description of Services:

The Provider offers life planning services, which include the development of a life plan, project plan, financial forecast, asset strategies, coaching support, and the provision of a final report called The Game Plan. The services can be divided into two categories:

A: Done by You Membership: Ongoing education, tools, email help, and support for clients to build and manage their own plans.

B: Done for You Mentorship: At least 12 hours of one-to-one personalised service to build and manage plans for the client during times of change or stress.

### 2. Pricing:

<b>The following fees apply to the services provided:</b>	<b>Please select:</b>
Initial Discovery Meeting (one-hour video conference): £100.	
A: Ongoing Membership: £495 per annum.	
B: The Game Plan Mentorship for Singles: £2,950.	
The Game Plan Mentorship for Couples: £3,950.	
Ad-hoc projects: Billed at an hourly rate of £200.	

We review our Fees every 31<sup>st</sup> December to ensure that we remain competitive and provide value for money, at which point an inflationary increase is likely to be applied.

### 3. Payment:

Fees are to be paid in advance. There will be no refund on cancellations. The Membership can be cancelled at any time with 30 days' notice.

### 4. Confidentiality:

The Provider shall maintain the confidentiality of all client information disclosed during the provision of services and shall not disclose such information to any third party without the Client's written consent, except as required by law.

### 5. Intellectual Property Rights:

All intellectual property rights associated with the services provided by the Provider, including but not limited to methodologies, tools, and materials, shall remain the exclusive property of the Provider.

#### 6. Dispute Resolution:

Any disputes arising from this Agreement shall be subject to general consumer law in the United Kingdom, including the Consumer Protection from Unfair Trading Regulations 2008 and the Consumer Protection (Amendment) Regulations 2014. The Competition and Markets Authority regulates this Agreement.

#### 7. Client Responsibilities:

The Client shall provide all necessary information and cooperation to enable the Provider to execute the services outlined in this Agreement effectively.

#### 8. Handling of Client Money:

The Provider does not handle any client money in relation to the services provided under this Agreement.

#### 9. Conflicts of Interest:

Any conflicts of interest that may arise during the provision of services shall be disclosed to the Client by the Provider.

#### 10. Liability:

Nothing in this Agreement shall limit or exclude the liability of either party in the event of death, fraud, or unlawful activities.

#### 11. Force Majeure:

Neither party shall be held liable for any delay or failure to perform its obligations under this Agreement due to circumstances beyond its reasonable control.

#### 12. Assignment:

The Client shall not be entitled to assign or transfer the benefits of this Agreement. The Provider reserves the right to transfer its rights and obligations under this Agreement to another organization.

#### 13. Entire Agreement:

This Agreement, along with any documents referred to in it, constitutes the entire agreement between the parties and supersedes any previous arrangement, understanding, or agreement relating to the subject matter covered.

#### 14. Governing Law and Jurisdiction:

The validity, construction, and performance of this Agreement shall be governed by and construed under English Law, and the parties shall submit to the exclusive jurisdiction of the English Courts.

#### 15. Ordering Services and Payment Instructions:

To order any of the above services, please complete the relevant sections of this agreement to confirm your selection. Once completed, please provide your e-signature, and return the agreement to us by submitting an electronic order form.

This agreement shall commence on the Start Date, which is the later of receipt of this signed agreement by us and receipt of the corresponding payment by us of the relevant fee as per this agreement.

Payments can be made online by ordering through our Shop at [www.aolp.shop](http://www.aolp.shop). We also accept payments by cheque or electronic transfer with digital receipt notification. Additionally, we can request and collect online payments via email, SMS, or a shareable link.

Payment Instructions:

By Post:

Please make cheques payable to "The Academy of Life Planning Limited" and address them to:

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

Electronic Transfer:

Payee: The Academy of Life Planning Limited

Bank: Barclays

Sort Code: 20-69-85

Account Number: 33190838

If you have any questions, please contact the AoLP billing support team at 07850 102070 or via email at [info@aolp.co](mailto:info@aolp.co). Our billing support is available between 9 AM and 5 PM, Monday to Friday. Please have your Account Number ready before calling. Please note that without an Account Number, billing support may be unable to address account-specific queries.

Upon completion of the Agreement and Payment, you will receive a Welcome Pack by email. The Welcome Pack will outline the chosen Services and provide further instructions on how to commence your programme.

If you require further assistance, please do not hesitate to contact us.

**Agreement, Consent & Confirmation**

THIS AGREEMENT is made on \_\_\_\_\_ (Date).

BETWEEN:

The Academy of Life Planning Limited (referred to as "The Academy"), having its registered office at 9 Franklin Way, Spilsby, Lincolnshire PE23 5GG:

AND

\_\_\_\_\_  
\_\_\_\_\_

(referred to as "Clients"), with the address for correspondence at:

\_\_\_\_\_  
\_\_\_\_\_

This is a contractual agreement that both parties intend to rely upon. Please read this carefully before signing for your own benefit and protection. Please e-sign this document where indicated and return to us. If you have any questions or require further information, please do not hesitate to ask.

I hereby authorise the transfer of information on a confidential basis, as necessary, between any third parties involved. I acknowledge that this agreement will come into effect from the date of issue. Additionally, I confirm my consent for The Academy to contact me via telephone or email to discuss financial advice or planning in the future.

**Acceptance:**

- I/We have carefully read this Agreement.
- I/We have received a copy of the Privacy Notice document.
- I/We have received a copy of this Agreement.
- I/We fully understand our obligations to pay the fees as agreed.
- I/We understand that this service does not include specific product advice.
- I/We accept the terms of this Agreement.

Client Name(s):

Client Signature(s):

Date Issued:

Date Signed:

I agree that the client agreement will come into effect from the date of issue.

IN WITNESS of which, the parties have executed this Agreement underhand on the day and year written below.

Signed for and on behalf of The Academy of Life Planning Limited by Stephen James Conley

The Academy of Life Planning Limited

#### Our Details and Important Information

The Academy of Life Planning Limited issues this Terms of Business & Client Agreement.

Registered in England & Wales, Registration No. 8016568.

Registered Office: 9 Franklin Way, Spilsby, Lincolnshire PE23 5GG.

Head Office Correspondence Address: 9 Franklin Way, Spilsby, Lincolnshire PE23 5GG.

Information Commissioner's Office Registration as a data controller under the Data Protection (Charges and Information) Regulations 2018 Reference No. ZA502687.

Email: [info@aolp.co](mailto:info@aolp.co)

Website: [www.aolp.co.uk](http://www.aolp.co.uk)