

Project Brief: The Beam Network Learning Pathways

Date: July 2026

Organizer: The Beam Network

About the Beam Network

The Beam Network is a private financial education platform and global community for women of significant wealth, empowering one another to lead with confidence, invest with purpose, and shape a better world. The three pillars of our community are: Education, Engagement and Empowerment. Read more [here](#)

Our flagship cornerstone programme of classes and group coaching sessions, lays the foundations and holistically addresses both the academic and psychological sides of wealth. Read more [here](#) about the financial curriculum. Other components of our pedagogical assets, including psychosocial curriculum, our online foundations of finance curriculum and our recorded sessions will be shared with the consultant following the appointment.

The role

The Beam Network already offers members a robust, highly valued curriculum spanning both the technical (IQ) and psychosocial (EQ) dimensions of wealth. We're now evolving that offer – moving beyond world-class content to also provide members with clear learning pathways: personalised routes that guide each woman from where she is today to where she wants to be in her relationship with her wealth.

We're looking for an external consultant to work alongside the Beam to design and help pilot this approach. Our current thinking is that it would include the following steps and processes - we are open to being guided and are looking to the consultant to refine and test the most appropriate approach.

1. Designing investor archetypes that help members identify their ideal relationship with their wealth.
2. Building a competency framework under each archetype, covering both IQ and EQ (family dynamics, influence, confidence) competencies.

3. Designing an assessment mechanism to help members identify their current and target competencies against each archetype.
4. Supporting the piloting of 1, 2 & 3 with Beam members, and refining the approach based on real member feedback.

At a later stage of this project, we envisage we to be seeking support from a consultant with:

5. Creating a small database of educational resources (e.g. platforms, documents, e learning, courses) which could point members to (non-Beam) content that supports their learning goals.
6. Designing Beam curated learning sessions which empower as well as educate - based on steps 1, 2 and 3 above.

The Beam Network is agnostic as to whether this is the same consultant or not.

Estimated Scope

Approximately 80-120 hours in total, covering items 1-4 above; items 5 and 6 are a later-stage, separately scoped engagement

Timeline

- Onboard consultant: Week Commencing Aug 31
- Design phase: September
- Piloting and refinement: October & November
- Final submission of outputs: Week commencing Nov 30

Consultant Selection process

If you're interested, please email Francesca@thebeamnetwork.com by 28th August:

1. A short note (approx. 1 page) on how you'd approach this
2. Relevant skills and experience. A good grasp of financial markets and wealth management is required.

Furthermore, we're especially interested in your understanding of:

- frameworks for wealth holders
- the psychosocial aspects of wealth for women wealth holders
- Pedagogy
- Adult learning
- Communities.

3. Your day rate or an estimated total quote for 80-120 hours

4. Availability against the timeline above

At a later stage, we may ask for one or two references or examples of similar work, if available.

Note that applications are reviewed on an ongoing basis, so early application is encouraged.

Please get in touch with any questions – happy to talk through the brief before you put a proposal together. You can contact me on Francesca@thebeamnetwork.com.