

# WORKSHEET

## Action Work Plans

### Instructions

1. Duplicate this page for your own use.
2. Utilize the [Diversified Hiring Action Plan](#) as a template for any work plans you need to complete for your desired actions.
3. Outline your goals/outcomes, timeline, partners, and tactical steps.
4. Track your outcomes using the Impact Tracking Spreadsheet.

### BANKING Action Plan

<b>Action:</b>
<b>Goals/Desired Outcomes:</b>
<b>Timeline:</b>
<b>Stakeholders/Partners:</b>
<b>Tactical Steps:</b>

### HIRING Action Plan

<b>Action:</b>
<b>Goals/Desired Outcomes:</b>
<b>Timeline:</b>
<b>Stakeholders/Partners:</b>

**Tactical Steps:**

## INVESTING Action Plan

**Action:**

**Goals/Desired Outcomes:**

**Timeline:**

**Stakeholders/Partners:**

**Tactical Steps:**

## SPENDING Action Plan

**Action:**

**Goals/Desired Outcomes:**

**Timeline:**

**Stakeholders/Partners:**

**Tactical Steps:**

## GIVING Action Plan

**Action:**

**Goals/Desired Outcomes:**

**Timeline:**

<b>Stakeholders/Partners:</b>
<b>Tactical Steps:</b>

## Action Plan Example #1

<b>Action:</b> Replace our white male-led tax-prep firm with a Black-owned tax prep firm
<b>Goals/Desired Outcomes:</b> Achieve one step on the way to diversifying the partners we employ to help us manage our money.
<b>Timeline:</b> 1 year
<b>Stakeholders/Partners:</b> Husband Investment Advisor Impact Collective Community
<b>Tactical Steps:</b> <b>Month 1</b> <ol style="list-style-type: none"> <li>1) Send email to my network asking if they know of any Black-owned accounting firms or Black-owned tax prep firms</li> <li>2) Check Impact Collective resources to see if there are any Black-owned accounting firms or Black-owned tax prep firms</li> <li>3) Google Black-owned tax prep firms/accounting firms</li> <li>4) Gather potential new firms in spreadsheet</li> <li>5) Discuss with spouse</li> </ol> <b>Months 2-4</b> <ol style="list-style-type: none"> <li>1) Create hiring rubric with spouse (clarify what is most important to us in finding a new firm)</li> <li>2) Keep track of potential firms in spreadsheet</li> <li>3) Ask for introductions to firms someone in my network knows personally</li> <li>4) Reach out to new firms on my own if no one in my network knows them</li> <li>5) Schedule initial meetings with potential firms</li> <li>6) Clarify interview questions with spouse</li> <li>7) Meet with firms</li> <li>8) Debrief meetings and fill out rubric with spouse</li> </ol>

- 9) Re-assess process: are we on track to hire one of these firms? Do we need to readjust this action goal?

**Months 5-7**

- 1) Hire new firm
- 2) Sign contract/letter of agreement etc
- 3) Discuss onboarding with new firm: be extremely clear about our goals/hopes/dreams of new relationship
- 4) Discuss transition planning with old firm
- 5) Initiate transition plan
- 6) Set up 3 and 6 month check-ins with new firm

**Months 7-12**

- 1) Implement transition plan led by old firm and new firm
- 2) Monitor transition progress
- 3) Follow through on 3 and 6 month check-ins
- 4) Celebrate this milestone!

## Action Plan Example #2

**Action:**

Transfer banking from large corporate, white-owned bank to more values aligned and hopefully Black-owned bank

**Goals/Desired Outcomes:**

Ensure that our banking is aligned with our values  
Make sure that our savings are helping economically marginalized communities

**Timeline:**

6 months max

**Partners:**

Spouse

**Tactical Steps:****Month 1**

- 1) Research banks in my zip code using Mighty Deposits
- 2) Discuss my desire to align our banking to our values with our spouse
- 3) Show Mighty Deposits to my spouse

**Month 2**

- 1) Visit local branch of top three banking options
- 2) Research bank reviews

**Month 3**

- 1) Debrief research with spouse

- 2) Pick new bank to deposit some or all of our savings/checking money
- 3) Utilize online banking portal and other services to make sure this bank is going to work for us

#### **Month 4**

- 1) Go back to steps in Month 1 if the bank and their services don't work for us
- 2) If the bank and their services work for us, transfer all of our banking to this new bank

## **Action Plan Example #3**

### **Action:**

Talk to my spouse about our wealth priorities

### **Goals/Desired Outcomes:**

Align our wealth to our priorities

### **Timeline:**

2 months

### **Partners:**

Spouse  
Impact Collective Trio/Group

### **Tactical Steps:**

#### **Month 1**

- 1) Get moral support from my trio!
- 2) Let my husband know I'm interested in talking about money and our priorities with him
- 3) See if we can schedule a time to discuss our priorities
- 4) Get really comfortable/fluent with the Road Map and the Wealth Priorities/Impact Worksheet (the entire road map is my big goal but the just the priorities for our wealth will be my mini project with my husband for now)

#### **Month 2**

- 1) Meeting with my husband
  - a) Share just the priorities section of the Road Map with my husband
  - b) Get his take on the exercise
  - c) Share my initial thoughts on my priorities
  - d) Ask whether he has a sense of his priorities
  - e) See where we are aligned
  - f) Explore and get curious about where we diverge
  - g) Agree to chat about it again if necessary?
- 2) Share how it went with my trio!
- 3) Figure out my next steps
- 4) I might have to have multiple conversations with my husband about this so maybe I should

make a plan to come back to it a few times a year