



# WORKSHOP

## Your Personalized Action Plan

Date of Workshop: \_\_\_\_\_

Workshop Leader: \_\_\_\_\_

Your Name: \_\_\_\_\_

1. What one action step will you take to improve your financial communication?

\_\_\_\_\_

2. When will you take this action step?

One day from now

One month from now

One week from now

Other (Insert target date here.) \_\_\_\_\_

3. How will you measure success? (Examples include learning more about my money talk mindset, inviting someone to have a money talk, and engaging in a financial conversation.)

\_\_\_\_\_

4. List one roadblock you may encounter in completing this action step.

\_\_\_\_\_

5. List one strategy you will employ to overcome this roadblock.

\_\_\_\_\_

6. Who will be your accountability partner? (Examples include trusted friend, partner, a coach/counselor, or your financial advisor.)

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_

7. How will you celebrate your success?

\_\_\_\_\_

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