

Collective Abundance Fund – Spending Plan

How to use this worksheet:

The Wealth Building Spending Plan is used to demonstrate how you will spend your grant funds. **This plan should align with your goals and activities described in your application.**

Step 1: What is the goal?

Select from the drop down menu.

Wealth Building Goal # 1	
What is the Goal?	Business Development
How much do you need for this goal's activities?	\$25,000

Step 2: How much will you need for this goal's activities? Enter the dollar amount.

Step 3: What activities will you spend your grant funds on for this goal?

Provide details on how you will be spending these funds (for example: downpayment, tuition, business equipment, land purchase, cultural mentors, debt relief).

What activities will you spend your grant funds on for this goal?		
Equipment purchases for plumbing business. Supplies purchases for plumbing business. Marketing costs for business.		
How do these activities support your wealth building goal?		
Need updated equipment and supplies to strengthen my existing plumbing business. Advertising and other marketing will support business growth.		
Estimate the month you will spend the funds for each activity	List each activity	Amount
September	Trailer (equipment)	10,000
October	Plumbing supplies	10,000
November	Marketing costs	3,750
December		
January		
February		
March		
April		
May		
June		
July		
August	Marketing costs	\$1,250

Step 4: How do these activities support your wealth building goal?

Explain your why behind this investment.

Step 5: Estimate the month, list the activity, and the amount. Provide detail in when, what, and how much for your activities.

Note: Ensure the amounts for all wealth building goals add up to the requested amount within a 12 month period. Remember that 5% will be withheld until submission of an approved final report and documentation of expenditures at the end of the grant period.

Wealth Building Goal # 1	
What is the Goal?	
How much do you need for this goal's activities?	\$

What activities will you spend your grant funds on for this goal?

How do these activities support your wealth building goal?

Estimate the month you will spend the funds for each activity	List each activity	Estimated Amount
September		
October		
November		
December		
January		
February		
March		
April		
May		
June		
July		
August		

Wealth Building Goal #2	
What is the Goal?	
How much do you need for this goal's activities?	\$

What activities will you spend your grant funds on for this goal?

How do these activities support your wealth building goal?

Estimate the month you will spend the funds for each activity	List each activity	Estimated Amount
September		
October		
November		
December		
January		
February		
March		
April		
May		
June		
July		
August		

Health and Wellness Goal

How much do you need for this activity? \$
\$0-\$2,000. *Note: The amount you set aside is part of the total grant amount and not additional funding.*

What wellness activities will be supported by this plan?

Estimate the month you will spend the funds for each activity	List each activity	Estimated Amount
September		
October		
November		
December		
January		
February		
March		
April		
May		
June		
July		
August		