



Net Positive Consortium Inventory Assessment

- The first critical step toward becoming a net positive firm is to document your firm's existing programs and initiatives.
- This simple yet effective inventory assessment will help you understand where your focus lies, what programs are already in place, and where there may be opportunities for improvement or new initiatives established.
- The inventory assessment was designed to make this process easier, enabling you to capture all the relevant information in a structured way.
- Taking stock of your current efforts is essential to building a strong foundation for your net positive strategy.

Firm Name

Main Contact(s) at firm

**Do you already have a documented (written out and public to your employees)
Net Positive Pledge or similar pledge? Yes/NO**

If Yes, please supply

Please provide a few sentences on your firm's vision around being a net positive firm

Please provide examples of programs or initiatives you have in place that fall under the following Pillars. If there is something you are doing that doesn't fall into any of these categories, please just add under "Other". List as many of you have in place or in progress.



Team Member/Workforce

Title of Program

Description of Program (a few sentences)

Number of Years in Place

Any outcomes/metrics?



Environmental/Impact on the Planet

Title of Program

Description of Program (a few sentences)

Number of Years in Place

Any outcomes/metrics?



Community

Title of Program

Description of Program (a few sentences)

Number of Years in Place

Any outcomes/metrics?



Client Focused

Title of Program

Description of Program (a few sentences)

Number of Years in Place

Any outcomes/metrics?



Industry Focused

Title of Program

Description of Program (a few sentences)

Number of Years in Place

Any outcomes/metrics?

Other

Title of Program

Description of Program (a few sentences)

Number of Years in Place

Any outcomes/metrics?

Once complete, please email your self-assessment to suzanne@netpositivewealth.com to be reviewed for consideration as a member of the Net Positive Consortium in Wealth Management.

SUBMIT

