



Aligning Financial Planning with Your Values as an Entrepreneur

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Learning Outcomes:

Know what it means to align financial planning with personal and business values

Identify your core entrepreneurial values

Explore how you can align your values with your business



Introduction

- Explore social consciousness in business planning.
- Look at an example of a socially conscious business.
- Learn ways to contribute, such as obtaining B Corp certification.
- Reflect on aligning personal values with your business or career path.



Task - **Identify** Your Values

Identify your top 3 values that guide your business

Examples: Freedom, impact, sustainability

<https://padlet.com/rosdean3/my-grand-sandbox-wh1f17ffqgux9gnx>



Aligning your business finances with your values means managing money in a way that reflects your core principles.

Know: What does it mean?



- ¿Qué es lo que te hace vibrar?
- ¿Estás viviendo acorde a tus valores o a las expectativas de otros?



Why It Matters



- Aligns business decisions with personal integrity
- Builds customer trust and loyalty
- Supports long-term sustainability
- Improves clarity and confidence in money decisions



Edna's Corner Cafe



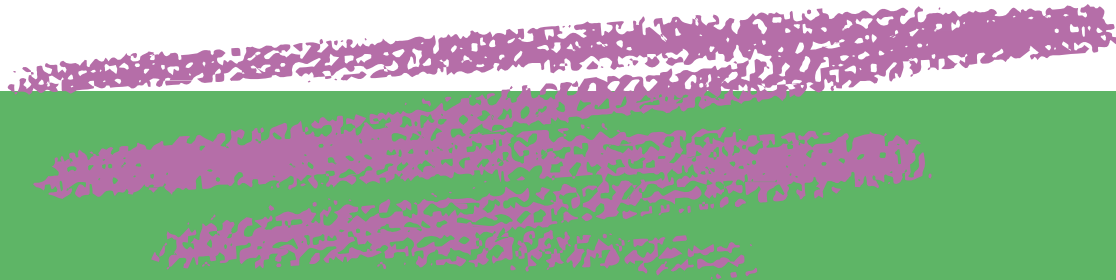
Edna's Values:

- **Sustainability**
- **Transparency**
- **Reasonability**



Case study:

Ikea



Better Homes



£117 million
invested in lowering prices



Introduced IKEA pick-up lockers in 3 locations



Half price meal offer launched for IKEA Family members

Better Lives



42 placements
on the UPPNÅ refugee employment programme completed



Invested over £35 million in the financial wellbeing of our co-workers



New partnership with the Baby Bank Alliance launched

Better Planet



55,841
items bought back through our Buyback & Resell service

7.3%
reduction in our operational waste since FY23



65%
of last mile deliveries in FY24 were zero emission

Better Company



1.7%
Positive operating profitability



Over 40%
of sales across the UK are made online



13.6%
increase in online transactions since FY23

What is B-corp?



B-Corp Case Study

<https://wilderoben.com/en/>

FOR EVERY PRODUCT SOLD, WILDEROBEN GIVES 1% OF ITS VALUE TO FOREST PROTECTION MOVEMENT WOLF

We started the partnership with the VLK Forest Protection Movement because we believe it's necessary to preserve our natural forests and keep fighting to extend protected areas and reservations in Slovakia. As we want to partake actively, we donate 1% of every product sold and all the profit from special events such as Green Friday or Dobrý trh. So far, we donated a total of 21 976 EUR.



Overall B Impact Score

Based on the B Impact assessment, wilderoben earned an overall score of 101.7. The median score for ordinary businesses who complete the assessment is currently 50.9.



- 101.7 Overall B Impact Score
- 80 Qualifies for B Corp Certification
- 50.9 Median Score for Ordinary Businesses

Governance

Workers

Community

Environment

Customers

Governance 6.8

Governance evaluates a company's overall mission, engagement around its social/environmental impact, ethics, and transparency. This section also evaluates the ability of a company to protect their mission and formally consider stakeholders in decision making through their corporate structure (e.g. benefit corporation) or corporate governing documents.

Mission & Engagement

2.5

Ethics & Transparency

1.8

+ Mission Locked

2.5

What is this? A company with an Impact Business Model is intentionally designed to create a specific positive outcome for one of its stakeholders - such as workers, community, environment, or customers.



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Are your financial practices aligned with your values?

Where might there be a disconnect?

Reflect



Look back at the values shared at the beginning

Explore

- What's one change you can make to align your finances with your values?
- Share one change you could make, or you already make in your business.



Looking for more? Check out our resources pack with links to videos, articles and more!



Pathway 1
I want to become an
entrepreneur
What I need to know and do



Pathway 2
I want to upskill
Upskilling - how to build

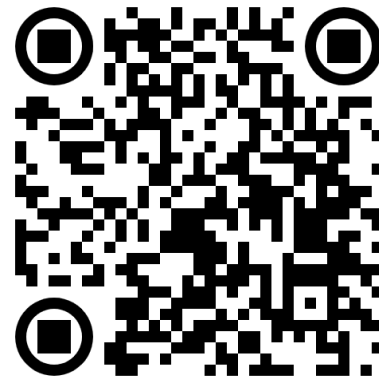


Pathway 3
I want to grow my business
Building my know-how



Pathway 4
I want to reflect and grow
Reflecting on my know-how

Start your learning journey now:



THANK YOU!



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