

EQUITY NOW



2025 – 2030 Strategic Plan

Equity = Ownership: Sustainable Growth Meets Financial Liberation



We are Equity Now, Inc., and we hold true to the belief that Equity equals Ownership. In financial terms, equity is the value you truly own, the difference between what you have and what you owe. Understanding equity as an owner and producer, not just a consumer is the foundation for Financial Wellness, the Pathway to Liberation, and the Bridge to Legacy. Equity is not simply about closing gaps; it is about creating opportunities for children and families to own, grow, and sustain wealth for generations. Through Collaboration, Respect, Excellence, Love, Diversity, and Innovation, we commit to turning Equity into Action, Ownership into Empowerment, Financial Knowledge into Freedom, and Freedom into A Lasting Liberatory Legacy.

Equity = Ownership. Ownership = Liberation. Liberation = Legacy.

Mission

To discover, design, and implement innovative solutions that build equity through ownership—advancing financial wellness and education from early childhood through adulthood as pathways to liberation and lasting legacy.

Vision

To globally seed strategy, resources and love to make tomorrow better for children, families and communities.

Core Values

Collaboration · Respect · Excellence · Love · Diversity · Innovation



EQUITY NOW



STRATEGIC PRIORITIES



World Class Educational Excellence Anchored in Ownership



Financial Education: Pathway to Ownership, Liberation and Legacy



Sustainable Growth for A Lasting Legacy

MISSION-FOCUSED AREA

The guiding framework for our programs and partnerships, reflecting our commitment to age-appropriate, culturally relevant financial education that empowers children, families, and communities to make informed financial decisions and build lasting economic stability.



VISION

To globally seed strategy, resources and love to make tomorrow better for children, families and communities.



MISSION

To discover, design, and implement innovative solutions that build equity through ownership—advancing financial wellness and education from early childhood through adulthood as pathways to liberation and lasting legacy.



equitynowinc.org

Strategic Priorities

Our key Strategic Priorities guide the initiatives and goals that transform Equity into Ownership, Financial Wellness into Freedom, and Opportunity into a Lasting Legacy.



EQUITY NOW

**World Class
Educational Excellence
Anchored in Ownership**



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**Financial Education:
Pathway to Ownership,
Liberation and Legacy**



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**Sustainable Growth for
A Lasting Legacy**

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World Class Educational Excellence Anchored In Ownership

	Initiative #1: Provide effective management solutions.	Initiative #2: Adhere to compliance of local, state and federal policies and regulations.	Initiative #3: Empower & Grow: Financial Wellness and Revenue Acceleration
Goals	<ol style="list-style-type: none"> 1. Provide effective management and oversight of Legends Charter Schools through the Equity Now’s network team. Measured by 80% yearly satisfaction rate on annual Equity Now, Inc. survey (internal). 2. Provide quality management with 80% yearly satisfaction rate for each of the following (external): <ol style="list-style-type: none"> (a) Charter and Education Management Clients (b) Clients (c) Program Partners 	<ol style="list-style-type: none"> 1. Successful renewal for Legends, minimum 3-years, K-8 Charter School application in Prince George’s County. Y/N 2. Maintain 100% bond compliance. 3. Remain in good standing with financial audits. Y/N 4. Remain in good standing with the Department of Assessments and Taxation. (localities) Y/N 	<ol style="list-style-type: none"> 1. 100% of Equity Now employees actively engage in personal, financial planning. 2. Equity Now to gross \$1M by year 2030. 3. Grow Financial Wellness and Wealth-Building participation by 20% annually across all communities we serve.



Financial Education: Pathway to Ownership, Liberation, and Legacy

Initiative:
Provide high-quality, Financial Education

Goals

1. Establish 5 community and corporate partnerships that are mission-aligned over 5 years.
2. Grow community and corporate partnerships participation rate by 30% that are mission-aligned over 5 years.
A. Global Youth Summit | B. Youth Investor Summit
3. Grow 3, revenue generating programs through Financial Education over 3 years.
*A. The Network – Engagement and Membership | B. Curriculum/Courses –Pre-K – grade 12 |
C. Merchandising – c1. set up store by 3rd quarter. c2. Generate \$2,500 in revenue.*
4. Achieve 50% investment accounts for LCS students that include custodial accounts or 529 plans (total school in the aggregate) and 75% for kindergarten. (Accountability goal 5 for LCS.)

Sustainable Growth for A Lasting Legacy

	Initiative: Increase and expand all forms of revenue streams.
Goals	<ol style="list-style-type: none">1. Increase Pipeline Donors by 25% annually through donations.2. Increase Corporate Partners by 10% annually.3. Increase yearly donations by 25%.4. Launch and sustain 1 endowment over the next 5 years.



As we look toward 2030, Equity Now, Inc. reaffirms its unwavering commitment to transforming Financial Education into a pathway for ownership, empowerment, and liberation. Our Strategic Plan—*Equity = Ownership: Sustainable Growth Meets Financial Liberation*—is more than a roadmap; it is a movement to reimagine equity as both a mindset and a measurable reality for children, families, and communities.

Through our focus on **World-Class Educational Excellence** and **Sustainable Growth for Lasting Legacy**, we will nurture informed, empowered individuals who build wealth, create opportunity, and sustain generational impact. Grounded in our core values—**Collaboration, Respect, Excellence, Love, Diversity, and Innovation**—we will continue to lead with purpose, act with integrity and innovate with compassion.

Together, we are not just closing gaps; we are building bridges—turning Equity into Ownership, Ownership into Liberation, and Liberation into Legacy.

Equity = Ownership.

Ownership = Liberation.

Liberation = Legacy.

