**SIMPLE ACCOUNT PLAN TEMPLATE**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| DATE |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MM/DD/YY |  |  |  |  |  |  |  |  |  |  |
| CREATED BY |  |  |  |  |  |  |  |  |  |  |  |  |
| Name |  |  |  |  |  |  |  |  |  |  |
| VERSION |  |  |  |  |  |  |  |  |  |  |  |  |
| 0.0.0 |  |  |  |  |  |  |  |  |  |  |
| GOAL |  |  |  |  |  |  |  |  |  |  |  |  |
| Provide the goal and vision for your plan. |
| ACCOUNT PLAN TEAM |  |  |  |  |  |  |  |  |  |  |  |
| Icon  Description automatically generatedIcon  Description automatically generatedIcon  Description automatically generatedIcon  Description automatically generatedIcon  Description automatically generatedIcon  Description automatically generatedIcon  Description automatically generatedNAME––––––––––––––––––––TitleNAME––––––––––––––––––––TitleNAME––––––––––––––––––––TitleNAME––––––––––––––––––––TitleNAME––––––––––––––––––––TitleNAME––––––––––––––––––––TitleNAME––––––––––––––––––––TitleNAME––––––––––––––––––––Title

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| PROJECT ACCOUNT ACTION PLAN |  |
| ACTION STEP | RESPONSIBLE | DESCRIPTION | STATUS | OUTSIDE SHAREHOLDERS | NOTES / CONSTRAINTS |  |
|  |  |  | ACCEPTED |  |  |  |
|  |  |  | ACCEPTED |  |  |  |
|  |  |  | DECLINED |  |  |  |
|   |   |   | DECLINED |   |   |  |
|   |   |   | ACCEPTED |   |   |  |
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