

# The Plan for the Estes'

## May 2007

Depending on His leading and strength!

“We’ve forgotten that we belong to each other, and we forget it at our peril.”  
– Mother Teresa

“You’re exactly what God had in mind when He made you.”  
- Father Greg Boyle, Homeboy Industries

# Key Areas of Focus

- Living with the joy of our salvation
  - Partnership with Kristi
  - Partnership with Tom
  - Trusting in God's providence
  - Capping & reducing material standard of living
  - Back in the exercise routine
    - Mostly consistent and feeling good

# Family Vision

- God-focused family
  - Following God's Word
  - Serving the community together
- Strong, lasting, "Polhemus Happy" marriage
- Unhurried living
- Christian, successful, well-educated Children
  - Nightly prayer on our knees for their spouses, sexual purity, protection from harm & to learn their saving faith
- Home for Entertaining and outreach to community
  - Leading Crown Financial Bible Study- finished 2<sup>nd</sup> class & running it for BAP
  - Goal Cultivator and socials

# Family

- Married 6.5 years to Kristi
- Our precious children:
  - Jordan turning 3 this month
  - Vyvien Taylor 8 months old
- Family
  - Great having Mom in our home
  - Deb- find a great Christian husband
    - Dating Hank and not coming to church

# Family- Kristi

- Kristi:
  - Bible Study Fellowship
  - Mothers & Others and Mommy & Me
  - Daily exercise including weights
  - Goals:
    - P.O.M. with finances / household organization- build a fence around weekday for her
    - Annual vacation without Jordan- Mexico in April was great
    - Spiritual growth in our relationship- Family Life weekend
    - Long-lasting marriage

# Family (con't)

- Concerns
  - Supporting non-Mom activities
    - Found great maid & still working toward one weekday support
    - Quicken
    - Exercise & Free time
  - Better at sharing my disappointment, anger & frustration
    - Restart counseling
    - Evening walks and PIT stops
    - Schedule "Best Days" for Kristi
  - Maybe one more child?
    - Time & complexity issues
    - Would help to have one more bed room

# Family Goals

- Get date night back! - Wednesdays
- Complete and maintain personal budget - Quicken, P&L (on 15<sup>th</sup> of month)
- Schedule quarterly extended vacations 12 months in advance- London, ?; Hawaii, Jan; France, April; Mex, Oct; Kerrigan \$1.2M Challenge, I'm taking him to Montage
- Plan 5 day get away for Kristi and I in the Fall
- Plan (4) 3 day weekends with Kristi

# Faith- Curtis

- Christian Growth
  - Morning recite Philippians / decide on Colossians
  - Evening My Utmost for His Highest
  - Devotional Classics w/Blake
  - Nightly prayer with Kristi on our knees
  - Accountability Group
  - Jim Lee Group
- Weekly prayer & discussion time with Kristi
- Nightly prayer time with Jordan on our knees- read story & sing "Jesus Loves Me"
- Distribute Pocket Gospel [www.pocketpower.org](http://www.pocketpower.org) daily

# Faith- Kristi

- Christian Growth
  - BSF
  - Work on personal prayer life
  - Active involvement with a group
  - Practice sharing the Gospel with Laura

# Education/Career- Curtis

- Career:
  - 2007: consistent cash flow of \$50K/month; No Office, no direct email/voicemail/phone
  - 2008-09: \$2M going to \$5M premium
  - 2010: CFP / Strategic Coach Implementor / Evangelist
  - 2020: giving away \$1M annually; Whitworth 'Trustee in Residence'
  - 188 Year Estes Legacy
  - \$140K coaching for Whitworth– San Jose phone coaching & New York 2 day
- Education:
  - Coach and Coach 2
  - One on one 'coaching' with Jim Lee
  - Teaching Crown
  - Attend Robert Cooke seminar

# Education- Kristi

- Education:
  - Learning Spanish
  - Chef certificate program
  - Play the piano

# Work Goals

- 40 Referrals Monthly
  - Top 20 Cloning- great success with BH Cheese
  - Team \$1M
  - BAC /BACC/Cal Club- great success with sponsoring new members
- Plan work & travel schedule w/ intentional family time using Ideal Week
  - Great new space downtown
  - Will move to WLA in 3-5 yrs
- Lana & Jen 3 yr career plans
  - Ideal Life Facilitator, Relationship Manager on every call
  - Jessica and Jordan didn't go according to plan
- Future Career Plans
  - Goal Cultivator Community
    - LA Coach GCC & Next Client GCC?
  - Writing LIFE by Design book w/ ghostwriter for \$16K
  - Write book on "Well Worn Path to Success" based on speech & handout
  - Current and next two companies
    - Financial Transformation
    - Future Transformation
      - LBD \$5K from Nelly & Anthony

03/11/2008 ● Present & Eternal Transformation

# Recreation Goals

- Running/cardio 4 mornings weekly + 2X weights
  - 1% Rule/day- new muscles every 3 months
  - Weigh 190 lbs
  - Enjoying elliptical Blockbuster hour
- Golf Tues-Thurs w/clients
- Park/pool with Jordan most evenings
- Paddle tennis / bike with Tom
- Cal Club Book Club

# Short Term Focus

- Financial Consistent Cash Flow/Cushion
  - as by-product of \$1.2M Kerrigan Challenge
- Do What I Enjoy
  - Face to Face with Superstars
  - More networking through fun- BH Cheese & BACC
  - Coaching for Whitworth
- Savor time with Jordan, Vyvien and Kristi
  - Serve Kristi when I get home to support her efforts with both of them
  - Saturday mornings for Jordan and Daddy adventures w/Reasners, BH Hotel Coffee Shop, JC Beach
  - Sunday as Family Day (like vacation)
- “Restore unto me the joy of my salvation”
  - Give to the current acute needs: BAP & Campaign, Whitworth, Imagine LA & IJM
  - Stay dependent and connected to Jesus

# Eulogy

- Christian- loves Jesus
- Loving husband, father, grandfather & friend
- Made a difference in the community
  - BAP Elementary School
  - Polhemus Hall for Inspired Leaders
  - Family Foundation with kids on board giving away \$ during my lifetime
- 188 Year Legacy- Pass on Christian values to last more than 188 years
  - Give inheritance beyond education? 10K+ inflation?

# Questions & Input

- Goals & Game Plan- HANDOUT
- Get Out of Your Own Way integration
  - Awake at 6 am, 200 push ups, view horizon & emotionally connect w/ 5 + year open space goals
  - Workout & night shirt w/ who I'm becoming
- Jordan and Jessica lessons learned
- Status of YSN- Scott & Jen
- Kerrigan \$1.2M Challenge

# Accountability

- Bring Client Builder #'s w/ 30 refs and 50 kept
- Monthly P&L by July- now Dec
- Kerrigan \$1.2M Challenge by November-  
re-up for the Challenge in 2007
  - Team bonus like Phil