

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 2nd class & running it for BAP
 - Goal Cultivator and socials

03/11/2008

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 15th 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 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