

## *Living Forward Life Plan Example*

# **Tom**

### *Eulogy*

Tom was known as a family man whose mission in life was to positively impact the lives of children. He and his wife, Lisa, made their children, grandchildren, and great-grandchildren priorities in their lives. Lisa was the love of his life, and they spent many days together in love and laughter, both as a couple and with their amazing family.

Tom's three children had him wrapped around their respective fingers from the day they were born. He coached many of their basketball and baseball teams when they were younger, always emphasizing the same lessons: have fun, hustle, and display good sportsmanship. His kids never forgot those lessons and realized they were applicable not only in sports but in life: have fun, work hard, and treat others with kindness and respect.

After a lengthy career in the mortgage industry—including twenty years as the owner of a thriving mortgage company—Tom became a successful high-school basketball coach. Hundreds of the players he coached were in attendance at his memorial service, primarily because he cared more about them as people than as athletes.

The term *life balance* is one that Tom believed in wholeheartedly. He strived to instill the importance of balance into everyone he met and his life was an example for others to follow.

### *Action Plans*

#### Account 1: Lisa

Purpose: I have an incredible life partner in Lisa. She is beautiful, thoughtful, understanding, smart, funny, athletic, and a lover of sports. Contributing to her happiness, success, and achievements brings me an incredible amount of joy. We work together to build a strong, happy, purposeful family.

Long-term vision: Lisa and I will continue to date each other on a regular basis now and when we are empty nesters. We will continue working as a team toward goals and dreams, as well as enhancing our day-to-day happiness. We will continue to have a loving, passionate marriage that is able to withstand any turbulence.

Short-term goals/specific commitments:

1. I will devote at least two nights per month as “date nights” with Lisa. This evening will be spent without the kids.
2. I will spend “quiet time” (glass of wine, cuddling, etc.) with Lisa at least three times per week.
3. My family and I will take at least five vacations (overnight or more) outside our hometown each year.
4. My family and I will have one crazy-fun experience each quarter.

#### Account 2: Sarah, Sam, and Johnny

Purpose: I have been given the most amazing gifts on Earth. Our kids rock! I will do everything possible to love, nurture Sarah, Sam, and Johnny and ensure that they grow up in a safe, fun, positive, and healthy environment.

Long-term vision: I will have great relationships with my kids. They will be physically and emotionally healthy and happy, and they will contribute positively to my life, Lisa’s life, and most importantly, society.

Short-term goals/specific commitments:

1. I will continue to coach each kid’s baseball and basketball teams. I will spend one day/week in school with Johnny.
2. I will read three books and/or attend three clinics per year related to child development issues, motivating kids, coaching, etc.
3. I will have one date night (one-on-one time outside the house) each month with Sarah, Sam, and Johnny.

4. I will spend the day one-on-one with each child on their half-birthday, engaging in activities chosen by the kids.

### Account 3: Physical Health

Purpose: I am in excellent overall physical condition. My diet and exercise program have been carefully scrutinized. I eat foods, exercise, and sleep in a manner that contributes to a long, healthy life and gives me the necessary energy throughout the day that allows me to be a great husband, father, leader, and friend.

Long-term vision: I will continue to monitor my health on an ongoing basis. I will be able to perform the same physical activities at fifty that I am able to perform at forty. My annual physical checkups show great results. I complete an Ironman Triathlon annually.

Short-term goals/specific commitments:

1. Work out at least seven times per week.
2. I will complete an Ironman Triathlon by 2013.
3. Each year I will have my diet and health evaluated by a health professional.
4. I will be in bed by 10:30 each night.

### Account 4: Professional Success

Purpose: My achievements in the professional world allow my family to obtain financial security and allow me to act as a mentor and leader to all my employees.

Long-term vision: By forty-seven, I will have the ability to sell my company (most likely to my employees) for at least \$3 million. I will be able to choose to devote my working hours to contributing to the lives of children.

Short-term goals/specific commitments:

1. I will create a business vision, business plan, and recruiting/retention plan—and incorporate these ideas into my daily activities.
2. I will make myself completely available to all employees for questions, coaching, deal structuring, etc.
3. I will read twelve books per year devoted to business-related topics.

### Account 5: Financial Security

Purpose: I will achieve financial freedom at the age of forty-seven, allowing me to devote more time to contributing to the lives of my children, without worrying about the financial implications of that decision.

Long-term vision: By forty-seven, my family and I will live in a home with an indoor basketball court. By forty-five, our net worth, not including my business, will be at least \$2 million dollars; by forty-seven, our net worth will be at least \$3 million.

Short-term goals/specific commitments:

1. Lisa and I will meet with our financial advisor on a semiannual basis, to review our financial strategies and make necessary adjustments.
2. I will calculate my family's net worth each December.
  - Our real estate net worth should increase by at least 10 percent each year (from appreciation of properties and decrease in mortgage amounts owed).
  - Our equities plus cash (mutual funds, profit-sharing account, 401[k], checking accounts, etc.) net worth should increase by at least 10 percent each year (from added contributions and investment growth).

### Account 6: Friendships

Purpose: My friends have helped me through the highs and lows of my life. I have many great friendships, and I want to be able to contribute positively to their lives.

Long-term vision: I will continue to have close, dynamic, fun relationships with the people who are important in my family's life.

Short-term goals/specific commitments:

1. Each year my college friends will gather for a minimum of a three-day vacation.
2. Once each month we'll either invite friends over to our home for poker parties, kids' play dates, dinner, etc., or Lisa and I will go to dinner with them.

#### Account 7: Family

Purpose: My parents are amazing people, and I will continue to love and support them, as they do to me.

Long-term vision: I will be very close with both of my parents, stepparents, and Lisa's family, visiting with them often.

Short-term goals/specific commitments:

1. I will plan one activity (lunch, dinner, etc.) every two months with my mom.
2. I will talk to my dad on the phone once per month.