

Living Forward Life Plan Example

Scott

Outcomes

By whom do I want to be remembered?

- God
- My wife, Catherine
- Our children: Mark, Seth, and Nick (and their future spouses and family)
- Our family
- Our friends
- My co-workers
- Industry peers and acquaintances

What will they remember about me?

- Through my actions, real evidence that Jesus Christ is my personal Lord and Savior.
- My lifelong marriage commitment with Catherine.
- My family-first commitment and unconditional love for all family members.
- My passion for discovering and living out God's plan through a purpose-driven life.
- My passion for enjoying life and sharing life's experiences with family and friends.
- That by prayerfully seeking God's will and His plan, I added positive value to God's kingdom and to my family, co-workers, friends, and industry peers.
- A loving, caring, kind, generous, and helpful attitude.
- Being a man of high integrity, honesty, and optimism.
- My commitment to excellence in all endeavors.
- That I operated with a servant-leader mentality ("You can achieve whatever you want in life if you help enough other people get what they want").
- My belief that every experience, whether good or bad, uniquely prepares you for God's unique plan for your life.

- My daily prayer asking God to open the doors we should enter and explore, and shut the doors we should avoid.

Action Plans

Account 1: God

Envisioned future: I want to be closer to God and, through daily Bible study and prayer, understand and passionately pursue his purpose for me. I know God has a specific plan for me, and I want to accomplish all that he wants of me, so my life has eternal meaning and purpose. I want my life to add lasting positive value to his kingdom and to my family, friends, co-workers, and peers.

Purpose: I will be a Christian example, with a meaningful, purpose-driven life, providing inspiration to my family members and others to use their God-given talents to seek excellence in their chosen endeavors while making a positive difference in the lives of the people they touch.

Specific commitments:

- Daily morning prayer and quiet time.
- Personal Bible study/devotional before bedtime.
- Weekly group Bible study.
- Attend church regularly.
- Two personal days a year for reflection and update of My Life Plan (June, December).

Account 2: Catherine

Envisioned future: Catherine will be my very best friend, traveling companion, and lover. Together we will fill our memory bank to the brim with joyful times, shared adventures, close family relationships, and close friendships. We must continue our important roles of parenting and mentoring our children. Together, we will always be there to support our family and friends in time of need.

Purpose: God chose Catherine to be my lifelong companion and me to be Catherine's companion. Two people acting as one, unified with shared purpose, goals, and convictions, create an inseparable bond for a solid foundation for happiness and family cohesiveness.

Specific commitments:

- Take trips together and enjoy new experiences away from home.
- Include Catherine on business trips and Masters Coach events.
- Initiate daily contact by phone to see how Catherine's day is going.
- Get home by 5 p.m. at least one day a week.
- Have occasional lunch or breakfast with Catherine in the city.
- Take a monthly excursion together for shopping, site seeing, etc.
- Give occasional surprise flowers, gifts, fun items.
- Make evening time together for dates or hot tub or fire-pit visits

Account 3: Children

Envisioned future: Our children and their families and friends will enjoy spending time with us, and our family relationships will grow even stronger, more enjoyable, and more intimate after each encounter. They will learn important Christian family values and business ethics from us, and they will create strong, stable, caring families of their own. They will honor God by living meaningful, purpose-driven lives that will add value to God's kingdom.

Purpose: It's my responsibility to mentor our children, teaching them Christian values; and it's my prayer that the Donnelly family seeds forever will all worship Jesus Christ as their personal Lord and Savior and seek Jesus to be their life guide. This would be our greatest legacy.

Specific commitments:

- Initiate personal contact multiple times weekly.
- Always be available to listen to their needs and concerns.
- Have personal, one-on-one time monthly.

- Have family gatherings monthly.
- Spend Christmas and Thanksgiving together, at home or on a trip.
- Unconditionally love their future spouses and in-laws and openly welcome them as part of our family.

Account 4: Other Family Members

Envisioned future: I want my family members to understand that I am available to help them through good times and bad times, whether spiritually, physically, or financially.

Purpose: My role is to stay in touch, offer my help, organize the activities we can share together, and be a willing mentor; and to demonstrate to my children the importance of family.

Specific commitments:

- Call Mom multiple times a week and visit her often.
- Include family members in some of our activities.
- Send notes/emails to nieces and nephews for them to use me as a “sounding board.”
- Extend invitations to the Ranch.

Account 5: Close Friends

Envisioned future: Catherine and I will develop close friendships so we can enjoy and share times with our friends, and provide mutual support to each others’ families.

Purpose: Friendships outside our family are important for enjoying and sharing life’s experiences, but also for the development of family support teams.

Specific commitments:

- Movie nights and dinners together weekly.
- Quarterly wine/pool/spa parties, “Men’s Night Out” for poker, golf, lake house.
- Trips with friends.

Account 6: Health and Fitness

Envisioned future: I will be physically fit and maintain a weight under 225 pounds throughout my life, being an example for my children to encourage them to maintain healthy lifestyles throughout their lives.

Purpose: In order to accomplish my Life Plan, my dreams, and my goals and to enjoy Catherine, my family, and my friends, I must remain healthy.

Specific commitments:

- Weight goals must be set and monitored.
- Daily cardiovascular and strength training (minimum of thirty minutes, four days a week).
- Semiannual dental exams.
- Annual physical exams.
- Colonoscopy exams as recommended by doctor.

Account 7: Wealth Preservation and Management

Envisioned future: Catherine and I will accumulate assets that will provide a safe investment income stream of \$100,000 pretax monthly, without withdrawing capital.

Purpose: Our investment income provides Catherine and me the necessary funds to achieve our goals involving family, friends, business strategies, good health, recreation, travel, and charitable causes.

Specific commitments:

- Prepare a monthly balance sheet with detailed accounts.
- Utilize sound investment principles.
- Transfer property ownership to FLPs.
- Update family wealth strategy and wills.

Account 8: Successful Business

Envisioned future: Lead my company as a high integrity, family-oriented, Christian-based company and pursue its vision of using our God-given talents to make a positive contribution to the lives of our employees, shareholders, customers, and the people who provide services to us.

Purpose: My business is the vehicle or pulpit to help me accomplish my Life Plan and make a positive difference in people's lives.

Specific commitments:

- Support, explain, preach, and live out our vision statement.
- Connect with the hearts of our people.
- Constantly look for ways to add value to our people and our customers.
- Develop Life Plans for interested employees.
- Implement a phantom stock ownership plan for key people.
- Establish and distribute realistic corporate goals.
- Hold regional managers and direct reports accountable for results.
- Develop the lending industry's most respected sales training and coaching team.
- Publish an article or write a book of inspiration.
- Take two days off annually to discuss strategy and goals (May and Dec.).

Account 9: Recreation and Travel

Envisioned future: Catherine and I will have active lifestyles involving many activities, including travel, golf, hunting, fishing, boating, and skiing with close friends and family members.

Purpose: To enjoy life and experience the beauty of God's earth.

Specific commitments:

- Build several venues for family fun and travel.

- Build a legacy home on a crystal clear river that my children and grandchildren will never want to sell.
- Take frequent outings with family and friends.
- Take annual fishing trips.
- Take annual hunting trips.
- Take annual golf trips.
- Fulfill travel list:
 - Alaska (2010 with Nick)
 - Scotland, Ireland (with kids)
 - Italy
 - The Holy Land (with kids)
 - Egypt and the Pyramids
 - Nantucket
 - The Cloisters at Sea Island
 - South Africa
 - Henry's Fork Lodge
 - New Zealand
 - China
 - Bali (Cottage on the bay)
 - Vancouver, Canada
 - Albany, Georgia (Sherwood Baptist Church)
- Bucket list activities:
 - Play Augusta National Golf Club
 - Catch a tarpon, bonefish, snook, and permit on a fly rod
 - Catch a peacock bass
 - Catch a largemouth bass over 10 pounds
 - Play the Old Course in Scotland
 - View the Northern Lights
 - Harvest a 170-plus-inch whitetail deer

Account 10: Charitable Giving

Envisioned future: Catherine and I will be good stewards of the monetary blessings God has provided us.

Purpose: To give back to the church and community as part of our tithe.

Specific commitments:

- My Mount Everest goal: Donate \$5 million to charity.
- Give monthly to my local Christian radio station and other Christian-based organizations in an amount equal to 10 percent of our gross monthly income.