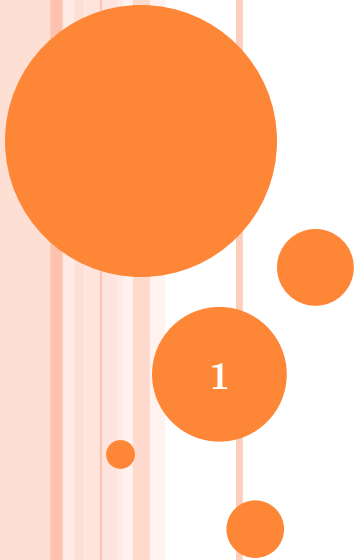


Slain Family Life Plan

Date Updated: 1/6/20

Where Updated: 568 Solon Road



OUR FAMILY LIFE PLAN

- In early 2012, Jonathan was introduced to Life Planning by his mentor, Paul Belair. Paul helped Jonathan create the first version of this life plan.
- Since then, the Life Plan has evolved year over year and now it is updated at least two times per year by Jonathan and Katherine preferably when on vacation somewhere inspiring (in 2020, that inspiring place was Park City, Utah during a family ski trip).



HOW & WHY

- Our House Rules – 3 simple rules we live by (in this order)
 - Act like ladies and gentlemen
 - Listen to your teachers
 - Have Fun
- Our Legacy:
 - We'll work hard so that we can play hard.
 - We'll provide for our immediate family so that we can live the lifestyle we would like to live now and after retirement, to provide for the comfort of our extended family, and to provide generational wealth for the schooling, businesses, and dreams of our kids and their kids and their kids...
 - We'll be happiest when our family is happy. We will use our good fortune and skills during our 78 years on this planet to build careers that matter and that improve the lives of others and in this way we'll leave a legacy.

SLAIN FAMILY QUEST BOARD 2020

2020 SLAIN FAMILY QUEST BOARD™!

THEME - Having Fun Feathering A New Nest!

<p>WORK/SCHOOL GOALS</p> <p>Katherine 1. K23 Awarded 2. 3 Manuscripts Submitted</p> <p>Jonathan 1. Find more CLE Opportunities 2. Invest in IOX Opportunities 3. Create Passive Income Opportunities</p> <p>Caroline 1. Watch less iPad on weekends</p> <p>Ame Penney 1. Be better at reading + math</p>	<p>HOUSE RULES</p> <ol style="list-style-type: none"> 1. Act like Ladies + Gents 2. Listen to your Teachers 3. Have Fun!
<p>HEALTH</p> <ol style="list-style-type: none"> 1. Wedding Weight! 2. Run > 120 miles each 3. Drink Hot Sake! 	<p>BUCKET LIST</p> <ol style="list-style-type: none"> 1. Drive Lambo 2. Build Dream House
<p>SOUL</p> <ol style="list-style-type: none"> 1. Give Better Energy/Attention to kids instead of whatever is leftover 2. Donate minimum \$2020 to Slain Family Foundation 3. Be outside More! 	<p>FINANCIAL</p> <ol style="list-style-type: none"> 1. Increase Net Income vs 2019 2. Fully Fund Retirement - 401K, 403B, 457, 529 Back Door Roth - Pay back 403B loan 3. Go/No Go Decision on final House + Barn Budgets
<p>2021 AND BEYOND...</p> <ol style="list-style-type: none"> 1. Financial Independence 	<p>ADVENTURE</p> <p>J - Park City</p> <p>F - Disney</p> <p>M - Costa Rica / Snowshoe</p> <p>A -</p> <p>M -</p> <p>J - Seafarer / Europe</p> <p>J -</p> <p>A - Myrtle Beach</p> <p>S -</p> <p>O -</p> <p>N - Raleigh for Thanksgiving</p> <p>D - New Years Ski Trip!</p>

4

THEME

- **2020 – Having Fun Feathering A New Nest**
- 2019 – FIRESTORM – Financially Independent, Retire Early, So This Odyssey Really Matters
- 2018 – Slain Family on FIRE: Financially Independent and able to Retire Early
- 2017 – Fortify our work and school, fortify our souls with adventure, and fortify our relationships with our friends and family!
- 2016 – Giving ourselves time and space to enjoy, explore and engage in our exciting new opportunities as an attending, entrepreneur, kindergartener and big girl!
- 2015 – Friends, Family & Finding a New Business!

KATHERINE WORK

- Katherine will continue to work full time thru 2020 and once we achieve FIRESTORM (Financially Independent and able to Retire Early so this Odyssey Really Matters) may scale back her hours.
 - Katherine may pursue more time in administration, teaching, researching, advocating, volunteering or recharging after a very tough career.
- 2020 Goals for Work
 - K23 Awarded
 - Submit 3 Manuscripts to Journals

JONATHAN WORK

- Jonathan will spend 5 years from 2017 thru 2021 implementing Traction with best in class leadership teams around the world. This will amount to 10,000 hours of experience in how to run a high performance team.
- 2020 Major Goals
 - Find More Cleveland Opportunities
 - Travel Less
 - Cleveland companies could turn into investments as well
 - Invest in 10X Opportunities
 - Similar to Ving investment in 2019, I want to continue to place some bets on some 10X opportunities at all times
 - Create Passive Income Opportunities
 - Long term, I'd like our financial nut to be covered by passive income
- 2020 Minor Goals
 - Less travel
 - Less than 50 hotel days for work
 - Start Rock Your Life
 - Write first draft
 - Continue Rock the Recession
 - 10 Paid Recession Gigs
 - 1000 Books Sold
 - More Products Sold (Reports, Workbooks, Self-Guided Kits)
 - Develop Online Course
 - 100 Traction Days
 - Earn 10% more Net Income than 2019
 - Start earning passive income
 - \$50k per year

FINANCIAL

- Increase our Net Income in 2020 vs. 2019
- Continue to fully fund our Retirement Vehicles
 - 401K, 403B, 457, 529s, Backdoor Roth, etc.
- Make a Go/No-Go decision on final budget
 - 137 E Washington Street House



SOUL

- Donate at least \$2020 to our newly established “Slain Family Foundation” which will donate to Abused, Impoverished & Neglected Kids
- Instead of the Kids getting whatever energy and attention is left over after a long day of work, give them more of our best

ADVENTURE

- Go on at least 4 mini adventure, long weekends together this year!

Month	Places to go
Jan	Park City Family Ski Trip Over New Years
Feb	Disney during Jonathan Work Event and Katherine Conference
Mar	Costa Rica Spring Break Trip and Snowshoe Long Weekend?
Apr	
May	
Jun	Seafarer Camp for Girls and Visit Charles in Europe
Jul	
Aug	Myrtle Beach to visit Grandmama
Sep	
Oct	
Nov	Raleigh to visit Newcombs for Thanksgiving
Dec	New Years Ski Trip (Park City or somewhere new like Steamboat, CO; Winter Park, CO; Whistler?)

BUCKET LIST

- Thrills
 - ~~SCUBA with Sharks (Completed 2014)~~
 - ~~Have dinner at French Laundry (Completed 2018)~~
 - **Drive Lamborghini (2020?)**
 - Catch live lobsters in the ocean
 - Go Tuna Fishing and eat sushi right on the boat
 - Dinner with a major movie star or POTUS
- Achievements
 - ~~Build a crazy fast computer (Completed 2017)~~
 - ~~Publish a book (Completed 2019)~~
 - ~~Set up a foundation to donate to abused and neglected kids (Completed 2019)~~
 - Write a memoir (if my story is good enough...)
 - Be invited to join YPO
 - Be Global Board Member of EO
 - Get a Patent
 - Story in NYT
 - Lobster tank in my house
 - Build a \$100M company
 - Get Pilot's license with Katherine for small plane Win over \$10,000 in a day playing Blackjack
- Family
 - ~~Buy 139 E Washington (Completed 2019)~~
 - **Build a dream house with Katherine (2020)**
 - Set up a foundation to pay for education of our kids, grandkids, and all family (loans that they could repay at 0% interest)
- Crazy
 - ~~Buy Katherine a BMW in Munich (Completed 2017)~~
 - Be on This Old House
 - Celebrate 50th wedding anniversary
 - Ride in a jetfighter
 - Own a second home? Beach house?
 - Live to 126!
- Travel
 - ~~San Francisco Tonga Room Bar (Completed 2016)~~
 - ~~Hawaii (Completed 2017)~~
 - ~~Japan (with kids) (Completed 2019)~~
 - **Chunnel (2020?)**
 - Tours by Disney, National Geographic or UNC
 - African Safari (with kids)
 - Great Barrier Reef (with kids)
 - Sail Bahamas (with Kids)
 - Great Wall of China
 - Little's House in France
 - Yellowstone
 - Florida Keys
 - Lisbon, Portugal (Ramiros for shellfish)
 - Alaska
 - Rio, Brazil for Carnivale
 - Mexico City for Dia De Los Muertos
 - Everglades
 - Eurorail
 - Hong Kong
 - Bora Bora or Fiji
 - Colorado River (White Water)
 - Iceland (with Kids)
 - Vancouver/Portland
 - Whistler Skiing (with Kids)
- Active:
 - ~~10K in under 1 hour (Completed 2014)~~
 - ~~Half Marathon in under 2 hours (Got close twice in 2015)~~
 - ~~Dogsledding (Completed 2017)~~
 - ~~Broadway Play with Girls (Completed 2018)~~
 - Attend Oscars
 - Attend Superbowl
 - Attend Wimbledon
 - Duke vs. UNC Basketball game in Front Row
 - Attend Summer Olympics
 - Master SCUBA Diver

IDEAS FOR 2021 AND BEYOND

- Purchase a rental property
 - Beach house
 - Intercoastal waterway
 - 1 flight from Cleveland
 - Start spending a week at a time “interviewing” potential locations
 - Maybe NC, SC, FL?
 - Meritt Island, FL
- Live in Europe for a year before kids in high school
 - Munich
 - London
 - Barcelona
- Achieve Financial Independence

CONCLUSIONS

- Life is good right now. We have our health, our marriage is great (we feel like teammates except we're spending a lot of time apart for work), Caroline (our 9 year old) is quick as a whip and Anne Penney (our 7 year old) has a personality completely her own. We love working on our careers and look forward to work almost every morning, well, except for Mondays!
- We are working hard right now so we can play hard now and achieve complete FIRESTORM (financial independence and the ability to retire early so this odyssey really matters) by the time we're 50 years old!
- Along the way, we're checking amazing things off our bucket list, like building a dream home together!