

***CREATING AN IDEAL FUTURE STATE FOR OURSELVES:
A QUESTIONNAIRE TO GUIDE THE DIRECTION SETTING PROCESS***

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Introduction

You are about to embark on an exciting and rewarding quest. This questionnaire was developed to serve as a guide to you on your journey to discover your *ideal future state* ... your discovery of an empowering and compelling vision of your future.

As you begin to seek out and define your ideal future state, you will need to recognize that the personal direction statement you create will be significantly influenced by your assumptions and perceptions of the events and relationships in your life (the past and present) and the world around you. You also need to recognize that, if you are to make the most of the opportunities that you will discover on this quest for an ideal future state, you must be open to them. Ideally, the future life that you determine as being the ideal future state for yourself, will be neither limited, nor constrained. You need only to believe that you have the ability and power to challenge, and when appropriate, change the paradigms of your life.

“If you can dream it ... you can live it.”

Walt Disney

NOTE: To enjoy the best experience and results from this direction setting process, it is recommended that you follow the sequential steps in this guide and to respond openly and candidly to the questions. I encourage you to create a “Direction Setting/Career-Life Planning Journal” (either spiral notebook or an electronic file version) to retain your notes and responses in. At some time in the future, you will likely want to review and update your Personal Direction Statement. You will find, having these journal notes and responses, to review and reflect back upon, to be very helpful. Before beginning your journey you should review the “Direction Statement Terms and Definitions” provided on pages 16 – 20.

Step One:

Recalling and Reflecting On Your Key Life Experiences

To assist you in your efforts, an imagery tool is provided to assist you in uncovering and recalling your key life experiences ... the *emotional highs*, the peak experiences you have enjoyed in your life and the *emotional lows*, the major disappointments you have suffered. After familiarizing yourself with the following imagery exercise, you will need to sit back comfortably in your chair, close your eyes, and relax ... now, imagine you are having a pleasant walk on a white sand beach.

Imagine that you are walking on a deserted, white sand beach ... the length of the beach is indicative of the years of your life ... this beach is your lifeline.

You stop, turn around, and look back down the beach you have just walked upon ... You see "footprints" in the sand ... Assume that these footprints are the record of the "Key Experiences" in your life ... they are imprints (a record) of your significant accomplishments/achievements, as well as your most severe disappointments/failures.

What do you see? ... What are the deepest and most lasting impressions you have made in the sand?

2. On the following page of this guide, "Step One - Notes/Comments," label the page - ***"The Key Experiences In My Life."*** Write down a brief synopsis of each key life experience ... your most memorable life experiences ... your emotional highs/peaks and lows/valleys. The experiences are the events that you feel have shaped and influenced your personal identity ... the person you are today.
3. Next to each of the recorded key life experiences, jot down a few notes as to why each one was so significant to you ... What was the key learning for you from each of these experiences? ... Why did these key experiences have such impact upon you and who you are?
4. Review and reflect on your notes and your overall life, to-date.
 - Who have been the "role models" in your life ... What causes you to see them this way? ... What did you learn from them? ... In what ways are you like them?
 - Who are you? ... What do you stand for? ... What are your passions in life?
 - What do you perceive as being your personal strengths and assets? ... What do you like and value the most about yourself?

- What do you view as being the things that you want to change the most about yourself and the life that you live?

Step Two:

Defining Your Core Values and Beliefs

“The most important thing in life is to decide what is most important.”

To assist you in defining your *Core Values ... Core Beliefs*, review the value terms listed below. Circle any the ones that "stand out" because of their importance to you. Then select your *top four-to-six* values and rank them 1-thru- 6, in order of importance. Feel free to add your own value terms, if needed. Note: For clarity and to avoid perceptual distortions, you should “operationally defined” your selected value terms.

| | | |
|---------------|----------------------|-------------------|
| truth/honesty | persistence/tenacity | resourceful |
| efficient | sincerity | dependability |
| initiative | joy/happiness | trust |
| environment | close relationships | excellence |
| powerful | wisdom/knowledge | teamwork |
| self control | flexibility | service oriented |
| courage | perceptive | financial wealth |
| spirituality | commitment | freedom |
| excitement | recognition | friendship |
| creativity | learning | influence |
| happiness | straight-forward | justice |
| honor | originality | quality |
| innovation | candor | strong work ethic |
| obedience | prosperity | responsiveness |
| frugality | respect | fulfillment |
| community | fairness | purposefulness |
| integrity | order | strength |
| peace | decisiveness | self-control |
| loyalty | adventure | cleverness |
| clarity | cooperation | success |
| security | humor | stewardship |
| love | collaboration | support |
| empathy | kindness | sensitivity |
| creativity | reliability | leadership |

Step Three:

Determining What You Want For Your Ideal Future State.

To assist you in your efforts to define your *Ideal Future State*, read, reflect upon and respond to the following questions. Use the page, “Step Three - Notes/Comments” to record your responses.

1. Reflecting back on your work from Step One, which of your **strengths**, do you want to amplify and leverage upon for your ideal future?
2. What specific **changes** (personal and professional enhancements/improvements) do you want to make for you to be able to have your ideal future?
3. What are your dreams and aspirations for yourself? your personal life? your professional life? What are your financial goals and security needs?
4. What do you see as being your *personal mission* in life ... your ***purpose in life*** ... ***your passion***? ... What do you see as being the reason for your existence? ... In your ideal future state, what will you find absorbing, involving, and enthralling?
NOTE: Your Personal Mission Statement should be a concise, specific and finely focused statement of no more than 10 – 12 words ... ideally it would be able to be inscribed on a belt buckle or calling (business) card.
5. What do you aspire to yet *accomplish* in your lifetime? to yet *achieve*? How do you want your *Epitaph* to read?

An "Epitaph" of Your Life ... Your Lifetime Achievements and Accomplishments

Visualize yourself as a reporter for a local newspaper who has been given the assignment of writing about you ... your life ... at the time of your death; a point of time in the future; your epitaph. A chronicle of your life that will tell the reader who you were and what your significant accomplishments were in your lifetime.

Your epitaph should speak to you feel are your *most significant accomplishments*. Those that you have actually achieved, as well as the accomplishments that you hope to yet achieve, before the end of your life. This epitaph should be an accounting of the life experiences and accomplishments that you want to be remembered for; a verbal imprinting of your “footprints in the sand.”

You should include, in the epitaph, the memories of you from your family, friends, colleagues, business associates, and society at-large. What will be the memories of you? What impact will you have had upon them?

Step Four:

Writing Your Personal Direction Statement.

“The choices (decisions) required of us come from having a strong passion for life. A passion for life is more than a nebulous feeling of optimism and love of living. It is the commitment to life that motivates us to do our best and strive to make a positive difference in other peoples' lives. It is the determination to fight for what we believe in and to fight against suffering, injustice, and the waste of natural resources. It is the decision to transcend barriers that inhibit our best efforts. It reflects a commitment to be and to do more than we believed was possible.”

Muriel and John James
Co-Authors, Passion for Life

Personal Direction Package

A complete Personal Direction Package will contain the following components. The *Personal Mission Statement* (the focus and/or purpose of your life), a set of operationally defined *Core Value* (your ethical standards and/or core beliefs), the *Personal Vision Statement* (a verbal description of your ideal future state) and the *Strategic Priorities/Goals*. Your Strategic Priorities are the key components (themes) of your Personal Vision Statement. They are the critical ... the essential areas that you must address in your life if you are to attain your desired ideal future state..

After reviewing the notes and comments on your reflections and discoveries that you recorded in your Direction Setting Journal, you should be ready to write a succinct, clearly defined direction statement for how you intend to go about attaining your ideal future state.

It is recommended that you are clear in your mind as to your *Personal Mission Statement* (the focus and/or purpose of your life) and your *Core Value* (your ethical standards and/or core beliefs). These essential components will greatly assist you in determining the “rightness” of the direction you will set for yourself, your ideal future state. Your *Vision Statement* should, therefore, be written with a focus on the future. It should clearly identify the person, the life-style, the overall life you are fully committed to: the ideal future state you have defined for yourself. Your personal vision statement needs to be developed in alignment with your mission and core values/beliefs. Ideally written, it will have incorporated and integrated your current strengths, as well as reflect the personal and professional growth ... the changes ... you intend to experience.

NOTE: To view examples of the various components of a Personal Direction Packet, refer to pages 12, 13, and 14. They are only examples and should not be viewed as the only way to format your Personal Direction Package.

Step Five:

Communicating and Implementing Your Personal Direction Statement

Identify the *significant others* and *key stakeholders* in your life and share your Personal Direction Statement with them. Where appropriate, solicit their reactions and, most importantly, their commitment and support in assisting you in your efforts to live in alignment with your personal direction statement ... to achieve your ideal future state.

To ensure steady progress in your quest to live your vision of your ideal future state, you will need to undertake an annual review and evaluation of your progress. It would be very helpful for you to develop a "Personal Score Card." The use of annual Personal Performance Plans, including milestones that directly linked with your Strategic Priorities will greatly assist you in your tracking your progress in the fulfillment of your personal vision. The following is an annual Personal Performance Plan format:

PERSONAL PERFORMANCE PLAN

Strategic Priority - _____

What Is To Be Accomplished In 200X

Completion Date

-

Expected Outcomes/Measurable Results: (Milestones)

Specific Outcome/Result

Date to Be Completed

1.

2.

3.

4.

5.

JOHN DOE
(EXAMPLE - ONLY)

MY PERSONAL VISION STATEMENT

As I look to the future, I see myself as being a person who values and enjoys himself and is living a meaningful and successful life. However, I am also a person with a passion to continually grow and develop my abilities to effectively perform in the various roles I have chosen for myself. I envision myself as being a significant contributor to and valued member of my profession and my community. I believe that, in order for me to fully enjoy all aspects of my life and for me to be able to significantly contribute to the world around me, my ongoing personal and professional growth and development is essential to my realizing that vision of myself.

My family, friends, students, clients and colleagues all view me as an individual who gives back more than he takes away and who is a sensitive and caring human being, guided by his core values and beliefs. It is my intention to leave this world a better place for having been here. *I will have made a significant and valued difference in the lives of others.* I believe that the best indicator of my success in fulfilling my purpose in life ... my life's mission ... will be the accomplishments and achievements of the individuals I have coached, mentored and influenced.

I am striving to live my life to its fullest; to see each day as another opportunity to maximize my full potential. I will value each of my life experiences, seeking out new vistas and learning and growing from each one. While I fully appreciate and joyfully accept the support and encouragement of my family, friends and mentors, I recognize that I am, ultimately, the person who is accountable and responsible for my successes, as well as my failures I experience in my life.

I am committed to living a balanced life and will assign the appropriate priorities to the roles and relationships in my life. I am open to the opportunities that I am afforded to develop meaningful new personal and professional relationships and I am striving to keep my existing relationships healthy and mutually supportive. I am giving the attention and energy to my relationships that is needed to maintain their strength and mutual value. I am living my life with integrity, courage, and sensitivity. I am fully connected and involved in my interactions with others; family, friends, colleagues and clients.

Just as I value my personal freedom of choice, I will acknowledge the rights of others to their personal choices. I will respect the personal differences and values of others, while relying on my core values and principles for my own guidance. I will focus on my circle of influence by acting on those opportunities that I can do something about, while minimizing the energy and attention I give to issues and concerns beyond my ability to influence or control.

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MY PERSONAL MISSION STATEMENT

***"MAKING A SIGNIFICANT &
VALUED DIFFERENCE
IN THE LIVES OF OTHERS"***

MY CORE VALUES

- **Honesty & Integrity - Being straight forward, empathetically candid and true to my core values.**
- **Kindness and Sensitivity - Being empathetic and receptive to others.**
- **Commitment & Follow Through - Being someone who can be counted upon and who “walks his talk.”**
- **Devotion & Loyalty to Family, Friends & Colleagues - Being there, in both the good times and the bad times.**
- **Dedication to Continuous Personal Improvement – Seeking out and being receptive to feedback and striving to be a better human being.**

MY STRATEGIC PRIORITIES

- **To develop myself to my fullest potential; to continuously enhance my self-worth and self-esteem; to increase my knowledge, skills, and abilities to fulfill my life’s mission.**
- **To develop and maintain healthy personal and professional relationships.**
- **To live each day of my life to the fullest, while looking to the future with excitement and joy and avoiding any tendency to dwell in an unproductive manner on my past mistakes or what I should have done differently.**
- **To be recognized as an effective leader, educator and coach by the individuals and organizations I am attempting to influence and develop.**
- **To have it said about me that I am bringing something of value to the world around me and that I am making a significant and valued difference.**

2003 PERSONAL PERFORMANCE PLAN

Strategic Priority - To develop myself to my fullest potential; to continuously enhance my self-worth and self-esteem; to increase my knowledge, skills, and abilities to fulfill my life's mission.

What Is To Be Accomplished In 2003

Completion Date

Enhance my abilities and skills to perform more effectively in the role of a Coach, Educator and Advisor

December 17, 2003

Expected Outcomes/Measurable Results: (Milestones)

Specific Outcome/Result

Date to Be Completed

- 1. Schedule and attend a group facilitator seminar** **by end of 3rd Qtr., 03**
- 2. Schedule and attend interview/coaching seminar** **by end of 3^{4th} Qtr., 03**
- 3. Implement group facilitation improvements identified in the annual Executive Roundtable Member Assessment** **January 15, 2003**
- 4. Request mid-year performance feedback on facilitation from Members of the Executive Roundtable** **June 18, 2003**

Direction Statement Terms and Definitions

Direction Statement:

Definition: *A Direction Statement clearly defines the intended pathway a company, a work team, a family or an individual intends to follow to a desired and/or ideal future state.* It is a set of guides for maintaining a strategic focus or direction. A Direction Statement is most frequently used in organizational strategic planning efforts, but it is equally beneficial to individuals, families/relationships and other small groups. It is composed up of some or all of the following elements: Vision, Mission/Purpose, Strategic Priorities, Objectives, Core Values/Guiding Principles. The Direction Statement communicates: "Here's what we are here for, folks, this is where we are going to accomplish and this is what you can count on us for." The Direction Statement is a clearly defined "bridge" from the current state to the ideal future state. (See Figure 1.)

Discussion: Every individual and/or organized group of individuals, exist to accomplish some purpose. If this purpose is to be most effectively accomplished, the choices and actions of the individual(s) must be directed within some reasonable boundaries.

Even in the case of individuals and simple organizations (such as a single owner/manager and one employee or a small family), it can be very beneficial to be as explicit about the intended direction to be taken. As our lives develop and our worlds become more complex, the need for something to *guide* our behavior and the focus of our efforts becomes even more valuable. Both the organization and individuals need some form of predictability and structure. Typically, this guidance and control is provided in the form of role or job descriptions (i.e. manager, parent, teacher, etc.), clear rules and procedures, work assignments or chores and norms or rules of operation are developed and defined over time.

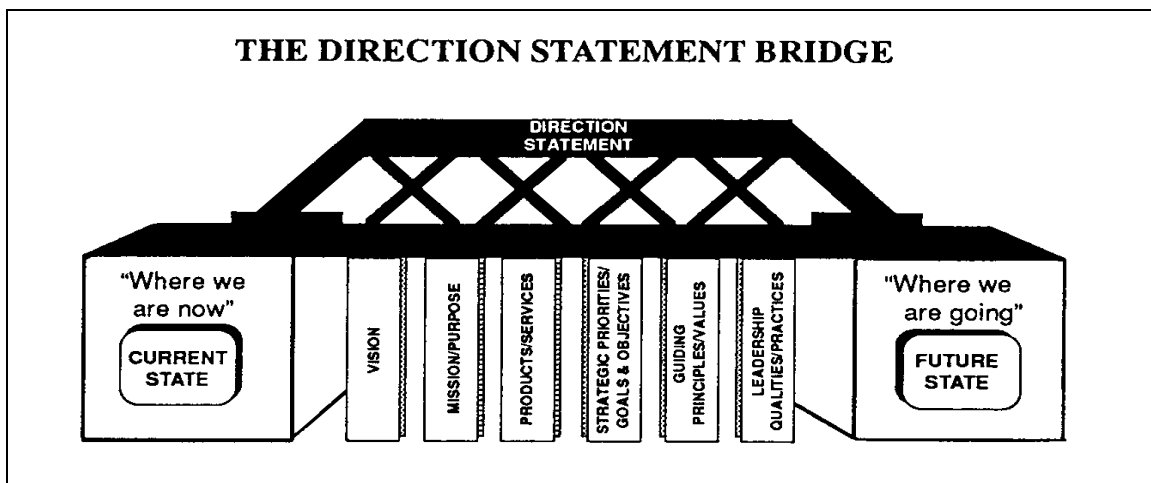


Figure 1

This method of providing guidance and control has drawbacks, however. It tends to assume that there "one best way" and that this way will not need to change with changing conditions. It also does not take advantage of the initiative and ability to contribute of all of all the "stakeholders." They will invest more creative effort and have more personal commitment if they fully understand the direction being taken, the intended destination and are allowed some involvement in how to best get there.

The elements making up the Direction Setting are intended to facilitate a move away from rigid rules and assignments. This is accomplished by providing an explicit description of what is important (Vision, Mission/Purpose, Strategic Priorities and Objectives) and general guidelines or principles for achieving those ends (Guiding Principles, Leadership Practices, etc.). When people are given the information they need, they *tend* to make individual choices that are "appropriate" for a given set of circumstances. Thus, when people are focused on what is important, and are given some freedom and flexibility in the way to respond, they will most often do what is needed and expected.

Vision

Definition: *A vision statement describes the "ideal future state" of an individual or organizational unit. It energizes and mobilizes the individual(s) to realize this ideal. It empowers people and creates enthusiasm describing the unique and distinctive contributions that the individual(s) will make in the chosen field of endeavor.*

The Vision is a statement that communicates: *"This is what makes us special/unique and what we foresee as our ideal future state."*

Discussion: The Individual (Personal) Vision Statement is an individual person's formal declaration of intent that describes his/her ideal future state. In the case of an organizational situation (i.e. company, relationship/family, work team), the organizational vision statement is also a formal declaration of intent. Additionally, the organizational vision statement is the result of the effective integration of the individual members' needs ... the key stakeholders ... with the needs of the overall organization. It is a rather personal statement, which must be responsive to some level of diversity in views/perceptions, changing trends, ever evolving challenges and opportunities and environmental (physical, financial, spiritual conditions. The organizational vision statement vividly describes the *"kind of organization we want to become" and "how we want to be perceived."*

The Vision Statement lends itself to being summarized or condensed into a series of short descriptive phrases, images, slogans and other devices that invite people to embrace it and own it. It provides substance with which an individual or individual are able to identify and associate with pride. The Vision Statement captures people's attention with its zest and boldness ... *To go where no man has gone before.* The statement may be the precursor of the Mission Statement (statement of purpose). In situations where a well-defined and currently viable mission already exists, the Vision may articulate how an individual or organization will improve upon its performance.

Mission/Purpose

Definition: *A statement describes the reason/purpose for the existence of an individual or organization's*; the nature and scope of the life to be lived and/or the achievements (outcomes) to be realized. The Mission/Purpose communicates: This is our focus ... our passion. We exist for this basic reason.

Discussion: The Mission Statement is an enduring and to-the-point description of the individual or organizational unit's primary focus. Other individuals or organizational units should be able to understand this statement. It is not a statement that tries to embrace and capture current trends. It simply describes the basic functions and intended outcomes. The mission statement stakes out the individual's or organizational unit's "territory." It is the foundation upon which the other components of the direction statement are built.

In some situations, a mission/purpose may be quite obvious. The individual's or organizational unit's territory is quite clear and succinct. There is no ambiguity as to the reason for existence. In other situations, where there is room for ambiguity and uncertainty, the articulation of the mission/purpose will demand clear thinking as to what our reason for existence really is. All too often individuals and organizational units do not develop a clear, precise mission statement. As a result, there is a tendency to become unfocused in our efforts and drift into areas that are not in alignment with our resources, abilities and capacities to perform and serve. As a result, we can become self-focused and self-serving.

As an individual and/or organizational unit develops and becomes more complex, its purpose ... its reason for existence ... can become less clear. In times of complexity and as the result of multiple and conflicting stimuli, people tend to lose their focus. We tend to make life choices and/or decisions that take us off course, unless the basic reason for the individual's or organizational unit's existence, our mission, is kept in very clear focus.

Core Values/Guiding Principles/

Definition: *A series of statements that serves as a code of ethics for guiding our lives and/or an organization.* Core Values and/or Guiding Principles are the criterion (standard) against which people can test future decisions and choices. Core values and/or Guiding Principles can not determine the direction you set for yourself nor your organizational unit, but they can certainly aid you in determining "the rightness of your direction and decisions. They communicate: "Whenever possible, we will look to these statements for guidance on how to act. We will strive to have our behaviors be in consistent alignment with these stated intentions ... We will walk our talk."

Discussion: Guiding Principles and/or "operationally defined" Core Values consist of a series of statements describing the behaviors and attitudes that are important to build

into the fabric of our daily lives and/or day-to-day operations. The statements are a result of a careful reflection and decisional outcome (conclusion) on a number of issues, which normally engender a diversity of opinion: our values and beliefs about people and relationships and the way we wish to live our lives. Note: When selecting/choosing a core value term (i.e. honesty, trustworthy, etc), this terms should be operationally define to clarify and confirm their full meaning.

Strategic Priorities/Goals

Definition: *A set of statements identifying the major outcomes around which the individual or organization allocates its resources and prioritizes its efforts.* If accomplished, these outcomes significantly focus the individual or organization on the mission, as well as enabling the fulfillment of the vision. **Strategic Priorities communicate:** *“These are key steps that will lead us to our ideal future state.”*

Discussion: Strategic Priorities identify the areas for particular focus and attention that are beyond an individual’s daily routine or the business-as-usual requirements of the organization. They generally are not measurable objectives, but rather are longer-range targets to keep shooting for.

Typically covering a 2-to-3 year period, they describe longer-range achievements and/or positions to be attained, improvements in performance and creative and innovative efforts. Establishing Strategic Priorities forces an individual or organization to say "of all the useful/needed/interesting things to do, these few are the ones which will significantly move me/us toward the attainment of the Vision." By setting a limited number of longer-range outcomes (typically two to five), Strategic Priorities also define, by exclusion, what should not get too much attention by the individual or organizational unit’s members.

The Strategic Priorities will be a useful mechanism for helping the individual or organizational unit's members to set the short-term performance objectives.

Performance Objectives

Definition: *A set of statements of short-term, measurable, with identified outcomes (milestones) to be achieved.* Performance Objectives that fall logically within a given Strategic Priority and that are essential to achieving that priority. **Performance Objectives communicate:** *“This is what you can count on me/us to specifically accomplish by a specified date.”*

Discussion: Performance Objectives state clearly **what** will be accomplished, by **whom** and **when**. To achieve any objective, numerous intermediate results (some sequential, other simultaneous) must be achieved. These are stated in terms of action plans ... each having its own set of action steps (milestones), resources and time frame. By monitoring

and tracking Performance Objectives, we can measure our progress and ensures that our daily routine and/or the day-to-day work is moving in the right direction ... focusing on the Mission, staying true to our Values, attending to the Strategic Priorities, accomplishing the Performance Objectives and Milestones and, ultimately, living the Vision.

A common problem occurs when performance objectives are not define to address a Strategic Priority, because of the format of a strategic priority makes it very difficult, if not impossible of stating exactly what specific action(s) needs to be taken. By contrast, the format of well developed and clearly stated Performance Objective provides a clear statement of WHO intends to do WHAT by WHEN. It defines what an individual or organizational unit intends to do in response to a particular Strategic Priority. Performance Objectives are also appropriate to use for those areas that require specific action, but fall outside of the stated Strategic Priorities. It is often important to define and track needed performance accomplishments in areas of our individual and/or organizational lives that are not in response to a specific Strategic Priority.

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