SECOND WAVE ADVISORS

Second Wave Process

Four client-ready emails for business owner conversations

EMAIL 1

Your Business Exit Has Two Parallel Plans

Subject: Are you preparing the business and the person leaving it?

A successful business exit requires a disciplined process. You prepare the company, understand its value, evaluate options, and manage the many financial, legal, and operational details involved in a transaction.

There is also a second process that deserves attention: preparing you for the personal change that follows.

For years, the business has shaped your identity, schedule, relationships, talents, and sense of contribution. Those parts of life do not automatically reorganize themselves when ownership changes. Even an excellent transaction can leave difficult questions if there is no personal vision for what comes next.

The Second Wave Process runs alongside the exit-planning process. It is designed to help you think intentionally about the life you are creating, not simply the company you are leaving. That work can feel unfamiliar because the questions are personal and may not have immediate answers.

You do not need a finished vision before beginning. You only need a willingness to explore. If you are open to it, I would welcome the opportunity to introduce the process and discuss where you are today. Reply to this email, and we can schedule a comfortable time to begin.

Advisor note: Personalize the greeting, closing, and proposed meeting method before sending.

EMAIL 2

The Right Answers May Need Time to Develop

Subject: Where can you create space to think clearly?

Business owners are accustomed to making decisions, solving problems, and moving forward. The questions surrounding life after the business often respond differently. They may require patience, reflection, and more than one attempt.

Your purpose in the next season may not appear after ten minutes with a worksheet. Some ideas need to be planted and allowed to grow through quiet thought and conversations with people you love, trust, and respect.

That can feel uncomfortable, especially for someone who is used to measurable progress. Yet uncertainty is not evidence that you are failing the process. It may mean you are finally considering questions that the daily demands of leadership never allowed you to explore.

Choose a place where you can think well, whether that is a quiet room, a coffee shop, a long walk, or somewhere else that helps you step away from interruptions. Protect the time, put the phone aside, and give yourself permission not to solve everything at once.

What question about your future deserves more thoughtful attention? I would be glad to help you create a starting point and work through it without rushing the answer. Reply to this email, and let us schedule a conversation.

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EMAIL 3

Five Elements Can Bring Your Next Season into Focus

Subject: How will your Values guide the 4 T's?

Life after the business can initially feel like one large, undefined question: What will I do next? The Second Wave Process makes that question more manageable by examining five connected elements.

Your Values clarify what matters most. Your Talents identify the abilities and experience you can carry forward. Your Tribe includes the people and communities that give you belonging and an opportunity to contribute. Your Time determines what you are willing to invest. Your Treasure allows your financial resources to support the impact you want to make.

Each element is useful on its own, but the greater clarity appears where they intersect. A talent may become more meaningful when applied to a Tribe you care about. A charitable commitment may become more fulfilling when it reflects your values and includes an appropriate investment of your time.

The process does not hand you a generic retirement plan. It helps draw out a vision that reflects who you are, what you have learned, and what life may now be asking of you.

Which of these five elements feels clearest today, and which feels most uncertain? I would welcome the opportunity to explore them with you and identify where to begin. Reply to this email, and we will find a convenient time to talk.

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EMAIL 4

You Do Not Have to Complete This Work Alone

Subject: Ready to begin exploring your Second Wave?

The questions involved in preparing for life after the business can be surprisingly difficult. Friends and family may care deeply about you, yet they may not fully understand what it feels like to step away from something you built and led for many years.

If parts of the Second Wave Process feel challenging, you are not doing anything wrong. There is no single correct timeline, and there are no perfect answers. Some owners gain clarity quickly, while others need weeks or months to reflect, revisit their thinking, and test new possibilities.

What matters is that you engage honestly and keep moving. The goal is not to produce an impressive worksheet. It is to develop a personal vision for how your Values, Talent, Tribe, Time, and Treasure can support a life of meaning, growth, and contribution after the business.

You have navigated difficult transitions before, but this one does not need to be handled by simply putting your head down and figuring it out alone. A thoughtful guide can ask better questions, provide perspective, and help turn emerging ideas into practical next steps.

If you are ready to dig in, I would be honored to walk through the process with you. Reply to this email, and we can schedule an initial conversation with no expectation that you already have the answers.

Advisor note: Personalize the greeting, closing, and proposed meeting method before sending.