**SECOND WAVE ADVISORS**

# Core Values Tool

Three client-ready emails for business owner conversations

## EMAIL 1

### What Matters Most When the Business Is No Longer the Center?

**Subject:** What will guide your decisions after the business?

For many years, your business has helped organize your priorities. It has influenced how you use your time, where you apply your talents, the people you spend time with, and how you invest your resources.

When you begin considering life after the business, those decisions become more personal. Without the familiar demands of the company, what will help you decide which opportunities deserve your attention?

Your core values can provide that foundation. They are the deeply held beliefs that help explain what matters to you and why. Identifying them may sound simple, but it requires more than selecting a few appealing words. It means reflecting honestly on the principles that have shaped your most meaningful decisions and relationships.

A helpful question to consider is: Why did you enter this business, and what did you grow to value most about the experience? Your answer may reveal values that can continue guiding you long after ownership changes.

If you would find it helpful, I would be glad to guide you through a Core Values conversation. 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

### Are Your Stated Values Reflected in Your Life?

**Subject:** The difference between naming a value and living it

Many business owners have carefully defined values for their companies. Those values may appear in the lobby, employee handbook, or strategic plan. A more personal question is whether the values displayed by the business also reflect the way you want to live.

That question is not always easy to answer. The pressure of building and leading a company can create a gap between what we say matters and where our time, attention, and resources actually go. Recognizing that gap is not a failure. It is an opportunity to make the next season more intentional.

Consider one value you believe is central to who you are. Where is that value clearly visible in your life today? Where might your choices be out of alignment with it?

The goal is not perfection. It is to identify a small number of values that can become practical rules for living and then begin making choices that reflect them more consistently.

If you are open to it, I would welcome the opportunity to explore this with you. Reply to this email, and we can arrange a confidential conversation about the values you want to carry into your Second Wave Life.

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

## EMAIL 3

### Let Your Values Guide the 4 T's

**Subject:** A clearer way to choose what comes next

After a business sale, new possibilities can arrive quickly. You may be invited to invest, serve on boards, mentor leaders, support charitable causes, travel, or become more involved with family and community.

These can all be worthwhile opportunities, but not every good opportunity is the right one for you. Without a clear filter, it is easy to fill your calendar while still feeling uncertain about whether your life has direction.

Core values provide that filter. They can help you decide where to invest your Time, how to use your Talents, which Tribes deserve your presence, and where your Treasure can create an impact that feels personally meaningful.

For example, charitable giving may provide a tax benefit, but giving becomes more purposeful when the organization and its mission reflect values you genuinely care about. The same principle applies to every major commitment you consider.

Which opportunities would you pursue differently if your core values became the starting point for every decision? I would be glad to help you work through that question and translate your values into practical next steps. Reply to this email, and let us schedule a time to talk.

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