TALENT TOOL SUB-CATEGORY

Financial Overview

Advisor Reference Overview | Based on The Second Wave Life: Finding Purpose, Impact and Fulfillment, Post-Exit by Andrew Williams

Talent focus: Financial is the opportunity to turn attention toward growing and maximizing the owner's personal balance sheet after exit, including investments, real estate, and other financial goals that may not have received sufficient attention while actively leading the company.

What Financial Means in the Second Wave Life

Williams describes the Financial category as a shift in attention that may occur after the business exit. For many owners, the company has absorbed substantial time and mental bandwidth. Once that responsibility changes, the owner may have an opportunity to focus more deliberately on personal investments, real estate, and other financial goals.

The book also notes that looking at personal finances with fresh eyes after exit can become an inflection point for the family. Financial decisions may create new opportunities for conversation, shared goals, and connection with a spouse or other family members.

How the Financial Category May Be Expressed

- Developing new goals for personal investments.
- Exploring real estate opportunities that previously received limited attention.
- Giving greater focus to growing and managing the personal balance sheet.
- Using newly available time and bandwidth to evaluate financial opportunities more intentionally.
- Creating new conversations with a spouse or family around financial goals and priorities.

Central idea for advisors: The Financial category recognizes that an owner's attention may shift from growing the company's balance sheet to thinking more intentionally about personal financial opportunities and goals after exit.

Questions for Advisor Conversations

- What personal financial opportunities have you postponed because the business required most of your attention?
- Are there investments, real estate interests, or other financial goals you would like to explore more intentionally after exit?
- How much time and energy do you want financial activities to occupy in your next chapter?
- Which financial decisions would benefit from greater discussion with your spouse or family?
- Does focusing on your personal balance sheet feel energizing, interesting, or simply necessary to you?
- How should this financial focus fit alongside your other Personal Readiness priorities rather than becoming the entire plan?

Connecting Financial to the Broader Talent Tool

The Talent Tool is intended to help owners explore where their time, energy, experience, and interests may go after the business. Financial is one possible category within that broader process. It may be especially relevant for owners who enjoy investing, analyzing opportunities, building assets, or setting financial goals and who now have more capacity to focus on those interests.

Within the InfusionOS Personal Readiness Methodology, the Financial category should be viewed as one possible outlet for post-exit attention. It does not replace professional financial, tax, legal, or investment advice, and it should be considered alongside the owner's Values, Tribes, Time, Treasure, and other Talent priorities.

What the Advisor Should Listen For

- The owner is excited by investing, real estate, or other financial opportunities that were difficult to pursue while running the company.
- The owner has focused heavily on the company balance sheet but has given less attention to personal financial goals.
- The owner wants a new area of analysis, decision-making, or asset building after exit.
- Financial planning conversations are creating new opportunities for spouse or family involvement.
- The owner appears interested in financial pursuits but has not decided how large a role they should play in the next chapter.
- The owner is treating financial activity as a possible source of engagement, but it is not yet connected to the broader Personal Readiness vision.

Advisor Takeaway

> The Financial category can provide an owner with a meaningful new area of focus after exit, particularly when investments, real estate, or personal asset growth are genuinely engaging. The advisor's role is to help the owner recognize whether this interest belongs in the Second Wave Life and how it should fit with the rest of the Personal Readiness plan.

Suggested Use in the Advisor Portal

Use this overview alongside the Financial Tool video and related Talent Tool assets. It can serve as a quick advisor reference when helping an owner determine whether personal investing, real estate, financial goal-setting, or related activities should become a meaningful part of life after the business.

Source: Andrew Williams, The Second Wave Life: Finding Purpose, Impact and Fulfillment, Post-Exit, Talent Tool section: Financial.

© Infused Holdings LLC. InfusionOS advisor resource. For authorized member use. Book content and underlying Second Wave Process materials remain the intellectual property of their respective rights holder(s).