TALENT TOOL SUB-CATEGORY

Legacy Overview

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

Talent focus: Legacy is the deliberate work of deciding how the owner wants to be remembered and what kind of positive influence they want to leave with family, Tribes, communities, and future generations.

What Legacy Means in the Second Wave Life

Williams frames Legacy as something that must be defined intentionally. The book argues that a meaningful legacy is unlikely to emerge by accident. Owners need to think deeply about who they are, the values they want remembered, and the influence they want to have on others after they are gone.

The book notes that philanthropy and service can be part of Legacy, but it emphasizes that the strongest legacies are often relational. The way an owner influences family members, colleagues, Tribes, and other people can become a more enduring part of Legacy than financial gifts or public recognition alone.

How Legacy May Be Expressed

- Strengthening relationships with family and important Tribes.
- Mentoring or guiding people who can benefit from the owner's experience.
- Using philanthropy or service to support causes that reflect personal values.
- Passing along principles, stories, wisdom, or traditions that matter to the owner.
- Creating opportunities for future generations or communities.
- Being intentional about the emotional and relational impact the owner wants to leave on others.

Central idea for advisors: Legacy is not simply what an owner leaves behind financially. It is also the values, relationships, influence, and meaning that continue through other people. Personal readiness gives the owner an opportunity to define that legacy while there is still time to act on it.

Questions for Advisor Conversations

- When people who know you well think about your life, what do you hope they remember most?
- Which values do you most want your family or Tribes to associate with you?
- Who are the people you most want to influence positively in the years ahead?
- What relationships deserve more attention if they are going to become part of the Legacy you want?
- Would philanthropy, service, mentoring, teaching, or family involvement play a role in that Legacy?
- What could you begin doing now that would make this Legacy more intentional rather than something left to chance?

Connecting Legacy to the Broader Talent Tool

Within the Talent Tool, Legacy is described as family- and Tribe-based activity, including growing the owner's influence with others. That makes Legacy closely connected to the Values and Tribe work already completed. The owner is not merely choosing an activity. They are considering where their influence should continue and what they want that influence to mean.

Legacy may overlap with philanthropy, service, mentoring, family leadership, and other Talent categories, but the defining question is different: What does the owner want to endure because they were here? The advisor can help turn that broad question into specific relationships, behaviors, commitments, and actions.

What the Advisor Should Listen For

- The owner talks frequently about family, future generations, or how they want to be remembered.
- The owner wants to pass along experience, values, or wisdom rather than simply assets.
- The owner sees philanthropy or service as part of a larger story about impact and meaning.
- Important relationships appear central to the owner’s sense of purpose after exit.
- The owner is concerned that stepping away from the business could reduce their influence or relevance.
- The owner has a strong idea of what matters but has not yet translated it into deliberate Legacy actions.

Advisor Takeaway

> Legacy requires deliberate thought and action. The advisor's role is to help the owner clarify the values and relational influence they want to carry forward, then connect those intentions to family, Tribes, service, philanthropy, and other practical choices that can begin well before the business transition is complete.

Suggested Use in the Advisor Portal

Use this overview alongside the Legacy Tool video and related Talent Tool assets. It can serve as a quick advisor reference when helping an owner explore how relationships, values, philanthropy, service, mentoring, and influence may contribute to the Legacy they want to build in the Second Wave Life.

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

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