TALENT TOOL SUB-CATEGORY

Portfolio Overview

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

Talent focus: Portfolio represents the possibility of another business venture after exit, whether the owner becomes involved at an early stage or with a more mature company and whether that involvement is active, advisory, or limited.

What Portfolio Means in the Second Wave Life

Williams recognizes that some owners will naturally begin thinking about another business opportunity, even while they are still in the early stages of imagining life after exit. The book does not treat that interest as a problem. Instead, it encourages owners to notice whether a new venture creates energy and curiosity.

The Portfolio category allows the owner to explore business involvement without assuming that the next chapter must recreate the company they just left. The level of involvement can vary. What matters is whether the opportunity genuinely interests the owner and fits the broader vision for the Second Wave Life.

How Portfolio May Be Expressed

- Exploring a new startup or early-stage business opportunity.
- Becoming involved with a more mature company in an advisory, ownership, or operating role.
- Taking meetings or calls about business opportunities that spark genuine curiosity.
- Investing experience, relationships, or capital in ventures without returning to a full-time operating role.
- Serving as a mentor, board member, or strategic advisor to entrepreneurs or leadership teams.
- Building a portfolio of selective business interests rather than committing to a single new company.

Central idea for advisors: A new business venture can be a legitimate part of the Second Wave Life when it is driven by genuine energy and curiosity rather than by discomfort with leaving the old owner identity behind.

Questions for Advisor Conversations

- When you hear about a new business opportunity, what kinds of ideas still energize you?
- Do you want to build another company, or would a lighter advisory, investing, or board role be more appealing?
- What level of involvement would feel energizing without recreating the demands of your current business?
- Which parts of entrepreneurship do you still want in your life, and which parts are you ready to leave behind?
- Would a portfolio of smaller business interests fit better than one major new operating role?
- How would a new venture fit with your Values, Tribes, Time, and other Personal Readiness priorities?

Connecting Portfolio to the Broader Talent Tool

Within the Talent Tool, Portfolio is one possible outlet for the owner's entrepreneurial drive. It acknowledges that leaving one company does not necessarily eliminate interest in business creation, ownership, investing, or advising. The important question is how that interest should be expressed in the next chapter.

The book encourages owners not to dismiss opportunities prematurely when they generate real interest. At the same time, the broader Personal Readiness work provides a useful filter. A new venture should be considered in relation to the owner's Values, desired use of Time, important Tribes, and other Talent priorities so that the owner does not automatically rebuild the same life they were trying to leave.

What the Advisor Should Listen For

- The owner becomes noticeably energized when discussing new companies, products, or business models.
- The owner says they do not want to retire but also does not want another demanding operating role.
- The owner is drawn to mentoring, investing, board service, or selective ownership opportunities.
- The owner has already begun taking meetings or exploring opportunities before the current exit is complete.
- The owner may be using another business as an automatic answer because life without an operating company feels unfamiliar.
- The owner has strong entrepreneurial curiosity but has not yet defined the level of involvement that would fit the next chapter.

Advisor Takeaway

> Portfolio gives advisors a way to distinguish between healthy entrepreneurial curiosity and an automatic return to the familiar. The advisor can help the owner explore business opportunities without assuming that the next venture must look like the last one, and can test each opportunity against the broader Personal Readiness vision.

Suggested Use in the Advisor Portal

Use this overview alongside the Portfolio Tool video and related Talent Tool assets. It can serve as a quick advisor reference when helping an owner explore whether another business venture, advisory role, investment, board position, or portfolio of business interests belongs in the Second Wave Life.

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

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