TALENT TOOL SUB-CATEGORY

Theological Overview

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

Talent focus: Theological refers to faith-based or spiritually oriented activities that may become more important as an owner moves into life after the business. This can include deeper involvement in a faith community, mission work, teaching, or a renewed examination of beliefs, values, and life principles.

What Theological Means in the Second Wave Life

Williams acknowledges that owners will approach faith and spirituality from different perspectives. Some will identify strongly with a faith tradition, while others may not. The category is included because a major life transition such as exiting a business can prompt deeper questions about belief, meaning, purpose, and the principles that guide the owner's inner life.

The book encourages owners to embrace this dimension rather than overlook it. For some, that may mean returning to a faith community or becoming more involved in it. For others, it may mean reassessing personal beliefs, core values, and the principles they want to live out in the next chapter.

How Theological May Be Expressed

- Becoming more active in a faith community.
- Participating in mission trips or other faith-based service activities.
- Teaching, leading classes, or mentoring within a faith community.
- Helping establish or support a place of worship or related organization.
- Exploring personal beliefs, life principles, and questions of meaning more intentionally.
- Connecting faith or spiritual principles more directly to the owner’s Values, Tribes, Time, and service priorities.

Central idea for advisors: Theological does not assume that every owner shares the same faith or any faith at all. It gives the advisor permission to recognize that major transitions often raise deeper questions about belief, meaning, values, and community, and that these questions may become an important part of Personal Readiness.

Questions for Advisor Conversations

- Has this transition caused you to think differently about faith, meaning, or the principles that guide your life?
- Is there a faith or spiritual community you would like to become more involved with after the business?
- Are there beliefs or values you want to explore more deeply in this next stage?
- Would teaching, mentoring, service, mission work, or another faith-based activity feel meaningful to you?
- Which communities help you live your values more consistently?
- How, if at all, should faith or spiritual principles influence the way you use your Time, Talents, and Treasure after exit?

Connecting Theological to the Broader Talent Tool

Within the Talent Tool, Theological is identified as a category for faith-based activities such as mission trips, establishing places of worship, or leading classes. The broader discussion goes beyond activity alone, however. Williams notes that an exit can create an opportunity to reconsider beliefs, inner-life principles, and the way those principles connect with core values.

This makes the Theological category closely connected to both Values and Tribes. For an owner whose faith or spiritual beliefs are important, the next chapter may include more time with like-minded communities and more intentional use of personal experience, leadership, or service in those settings.

What the Advisor Should Listen For

- The owner describes faith, spirituality, or life principles as central to their identity.
- The exit is prompting deeper questions about meaning, purpose, or what matters most.
- The owner wants to reconnect with a faith community after years of limited involvement because of the business.
- The owner is interested in mission work, teaching, mentoring, service, or leadership within a faith-based setting.
- The owner identifies values that clearly connect to a spiritual or theological framework.
- The owner is uncertain about beliefs but sees the transition as an opportunity to explore them more intentionally.

Advisor Takeaway

> Theological considerations can be an important part of Personal Readiness when faith, spirituality, or deeper life principles matter to the owner. The advisor's role is not to direct the owner's beliefs, but to create room for those beliefs and questions to be considered alongside Values, Tribes, Talents, Time, and Treasure.

Suggested Use in the Advisor Portal

Use this overview alongside the Theological Tool video and related Talent Tool assets. It can serve as a quick advisor reference when helping an owner explore whether faith-based activity, spiritual community, service, teaching, or deeper reflection on beliefs and values should play a meaningful role in the Second Wave Life.

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

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