



DESIGNING YOUR LIFE AFTER BUSINESS

- WHY YOUR PERSONAL PLAN MATTERS

INTRODUCTION



You've worked tirelessly to build a successful business. But what happens when the business no longer defines your daily life?

In exit planning, much attention is paid to financial security and maximizing business value—but far too often, business owners overlook *personal fulfillment*. Research shows that **75% of business owners regret selling their business within a year**, not because they lacked wealth, but because they lacked a clear, purposeful plan for what's next.

Your financial plan funds your future. Your personal plan defines it.

Without a clear personal plan:

- You may struggle with identity loss after stepping away from your business.
- You risk dissatisfaction, regardless of financial success.
- You could miss opportunities for growth, enjoyment, and legacy-building in this next chapter.

This section is designed to help you craft that personal vision—so you're not just making a living, but making a life.

Framework Overview: The Three-Legged Stool



Your personal plan is the
foundation of long-term happiness.



Section 1: Personal Vision



Passions & Interests

- What hobbies, causes, or activities excite you?
- Are there new skills, talents, or interests you've postponed while running your business?

Examples: Traveling, volunteering, woodworking, writing a book, mentoring others.

Your Response

Legacy & Impact

- What legacy do you want to leave behind?
- How do you want to support your family, community, or industry after exiting?

Examples: Philanthropy, mentoring entrepreneurs, community leadership, family traditions.

Your Response



SECTION 2: Designing Your Daily Life



Ideal Day Exercise Visualize your typical day post-exit

- Morning routine:
- Social interactions:
- Activities:
- How do you spend evenings?

Think about balance: relaxation, social time, learning, purpose.

Your Response

Social Connections

- Who will you spend time with regularly?
- Are there clubs, groups, or communities you want to join?

Your Response

SECTION 3: Health & Wellness

Physical Health

- What exercise or wellness activities will you prioritize?

Your Response

Mental Well-being

- How will you keep your mind stimulated (learning, reading, puzzles, classes)?

Your Response

SECTION 4: Financial Alignment

Budgeting

- What financial resources will fund your ideal lifestyle?
- Are there expenses tied to your personal goals (travel, philanthropy, hobbies)?

Your Response

Contingency Planning

- Do you have a plan in place for unexpected life events (health, family needs)?

Your Response



SECTION 5: Growth & Giving Back



Skill Development

- Are there new things you want to learn (languages, cooking, public speaking)?

Your Response

Volunteerism & Mentorship

- What opportunities excite you for giving back or sharing your experience?

Your Response



Final Reflection

Think of your exit not as the end, but as a pivot point. You've built something valuable. Now is your chance to build the life you've always wanted—intentionally, joyfully, and purposefully.

