THE SECOND WAVE LIFE

Chapter 14 Overview: The Travel Tool

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

Chapter focus: Chapter 14 treats travel as a common and valuable part of life after exit, while cautioning against treating travel alone as the owner's purpose. The Travel Tool helps owners turn broad travel dreams into an intentional plan that reflects core values, includes the people who matter, and fits available time and financial resources.

Chapter at a Glance

Williams recognizes that travel is often one of the first things entrepreneurs want to pursue after a transaction. For many owners, it represents freedom from years of business-related stress and can create both physical and psychological space between life as an owner and the beginning of the Second Wave Life.

The chapter also makes an important distinction: travel can become part of a broader purpose, but it should not automatically be mistaken for purpose itself. The Travel Tool is designed to help the owner brainstorm destinations, include a spouse, family, or other travel partners in the prioritization process, and then make realistic choices based on cost, time, and competing priorities.

Core Themes

1. Travel can support the transition out of ownership

Williams describes post-exit travel as a way to create distance from the routines and pressures of ownership. That physical and psychological space can help the owner evolve into the next stage rather than moving directly from transaction to another set of obligations.

2. Travel is valuable, but it is not automatically purpose

The chapter encourages travel strongly while cautioning owners against relying on it as the sole answer to the question of purpose. Travel is positioned as one element that can support a broader Second Wave Life.

3. Travel can reinforce core values

Trips may feel more meaningful when they reflect values already identified in the process. Williams gives examples such as family-oriented travel when Family is a core value or adventure-oriented travel when Adventure is central to the owner.

Core Themes, Continued

4. The Travel Tool starts with unconstrained brainstorming

Owners are encouraged to let their imagination run and list every destination they have considered, including International or Bucket List trips, Regional or domestic trips, and Local or close regional trips.

5. Prioritization should include travel partners

The process asks the owner to involve a spouse, significant other, family member, or friend who may travel with them. Each person can add destinations and score priorities before discussing a combined ranking.

6. The discussion itself is part of the value

Williams frames the prioritization conversation as an opportunity to dream together rather than negotiate. The goal is shared imagination and alignment, especially when children, grandchildren, or other family members may be involved.

7. Time and cost create necessary constraints

Once destinations have been identified and prioritized, the owner must compare the list against the time and financial resources available. The plan asks for estimated cost, time required, individual rank, partner rank, and a final combined score.

8. Travel can include service and contribution

The chapter prompts the owner to consider not only where they want to go, but also where their life experience might allow them to be of service. This creates another possible connection between travel, Talents, Tribes, and purpose.

> Central idea for advisors: The Travel Tool turns a common post-exit aspiration into an intentional planning exercise. Advisors can help owners connect travel to values and relationships, involve the people who will share the experience, and test the plan against realistic time and financial resources.

What the Advisor Should Listen For

- The owner describes travel as the entire post-exit plan rather than one part of a broader vision.
- The owner has a long list of destinations but no system for prioritizing them.
- The owner has not considered the preferences of a spouse, partner, family member, or other likely travel companion.
- The travel plan appears disconnected from the core values identified earlier.
- The owner is underestimating the time or financial resources required for the trips being considered.
- The owner has not considered whether travel could include service, contribution, family connection, or another meaningful purpose.

Advisor Conversation Prompts

- Where in the world do you feel most drawn to go, and what is pulling you there?
- Which travel ideas best reflect the values you want to live more fully after the business?
- Who do you most want to share these experiences with?
- How do their travel priorities compare with yours?
- Which trips belong on the near-term list once you consider both time and cost?
- Are there places where your experience, knowledge, or Talents could allow you to be of service while you travel?

How Chapter 14 Connects to Personal Readiness

Within the InfusionOS Personal Readiness Methodology, Chapter 14 demonstrates how a desired lifestyle activity can be integrated with the broader personal-readiness framework. Travel can create transition space, strengthen important relationships, reflect core values, and sometimes provide opportunities for contribution. The Travel Tool helps the owner turn that desire into a practical, shared, and resource-aware plan.

Chapter 14 Concept	Personal Readiness Connection
Travel can create transition space	Time away after exit can help the owner create physical and psychological distance from the former owner role.
Travel should not replace broader purpose	The advisor can help position travel as one meaningful component of the next chapter rather than the complete plan.
Core values can shape destination choices	The owner can prioritize trips that reinforce family, adventure, service, learning, or other stated values.
Travel partners should be included	Joint prioritization can strengthen alignment and make the planning process itself more meaningful.
Time and cost create practical limits	The Travel Plan converts a wish list into a realistic sequence of trips based on available resources.

Advisor Takeaway

Chapter 14 gives advisors a practical way to discuss travel without dismissing it as merely leisure or overstating it as a complete source of purpose. The advisor can help the owner connect travel to values, family and relationships, service, available time, and financial capacity so that the plan supports the broader Second Wave Life.

Suggested Use in the Advisor Portal

Use this overview as a quick reference before or after reading Chapter 14. It can support the Travel Tool lesson and help advisors prepare owners to complete the Travel Plan, including destination brainstorming, partner prioritization, and resource planning. It is not a substitute for reading the complete chapter or completing the related Personal Readiness exercise.

Source: Andrew Williams, The Second Wave Life: Finding Purpose, Impact and Fulfillment, Post-Exit, Chapter 14: "The Travel Tool."

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