F3: Female Forward Finance

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The day after the wire hits

A successful exit prepares your business, your wealth, and your legacy.

Preparing for your legacy

Over the past two months, I've written about two of the three dimensions of a successful exit.

In June, we focused on maximizing the saleable value of your business. Buyers want to know the company can continue to grow without you, which means building strong systems, developing your leadership team, and creating an organization that can stand on its own.

Last month, we shifted to maximizing your personal financial wealth. The planning you do before a transaction begins can have a meaningful impact on what you ultimately keep and how your wealth serves your family for generations.

This month, I'd like to focus on the third dimension: preparing yourself for what comes next.

Recently, I had the opportunity to sit down with executive coach Dr. Leigh Kearney on the F3 podcast. Leigh has spent more than three decades advising CEOs, founders, boards, and executive teams through periods of significant transition.

She explained that she encourages every founder to cultivate another dream before they sell, a simple yet powerful piece of advice that reminded me of a transition in my own life.

Years ago, after my daughter was born, I stepped away from Wall Street. For years, my career had shaped much of my identity; almost overnight, I found myself struggling to answer when people asked what I did.

I loved being a mother. At the same time, I knew I still wanted to build, contribute, and create. I simply hadn't spent time thinking about what that next chapter would look like.

Over time, I found my way. I went back to school, started another business, became more involved in philanthropy, and worked with coaches and aptitude specialists who helped me better understand where I could create the greatest impact.

Looking back, the greatest gift during that time would have been a community of women who were asking the same questions I was asking, who could help me think beyond my career, clarify my values, and imagine the legacy I wanted to build in the next chapter of my life.

I think about founders preparing for an exit through the lens of that experience. The transaction marks the end of one chapter while creating the opportunity to write the next one with intention.

Legacy is often associated with estate planning. That's certainly part of the conversation, but I also think about legacy more broadly. Legacy lives in the people you develop, the culture you create, the causes you support, the families your business provides for, and the opportunities your success creates for others.

Your wealth becomes another tool for expressing your values.

Your experience becomes something worth sharing.

Your leadership continues long after you've left the CEO seat.

As you think about your own transition, consider a few important questions

- What kind of legacy do you want your business to leave?
- How do you want your wealth to create opportunity for your family, your community, and the causes that matter most to you?
- Who is helping you think about your next chapter before the transaction begins?
- What relationships, interests, or ideas would you like to invest more deeply in after your exit?
- What would another dream look like for you?

Throughout my conversation with Leigh, we kept returning to the centerpiece conviction that founders approaching an exit need to look beyond the transaction and prepare for a life that reflects everything they've worked so hard to build.

The first dimension prepares the business.

The second dimension prepares your wealth.

The third dimension prepares your legacy.

Onward,

Jill