

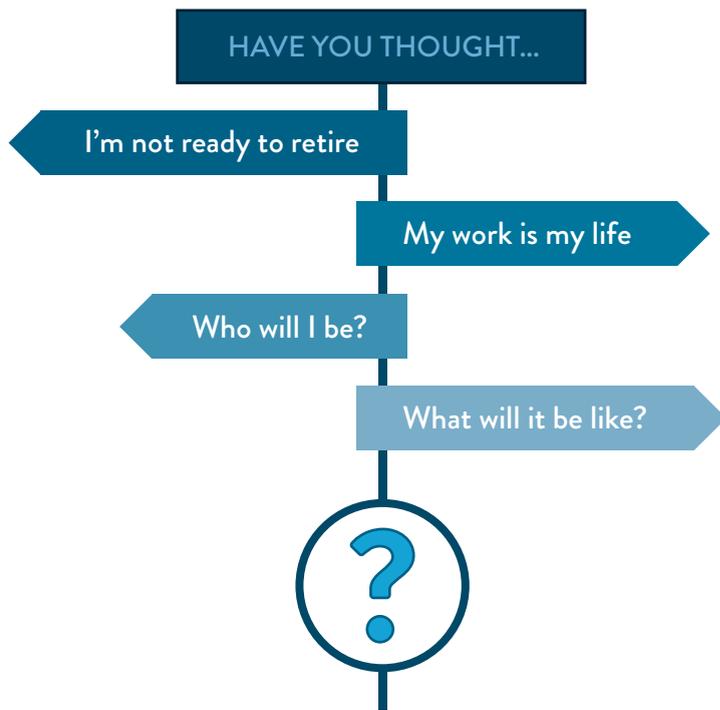


TRANSITION PLANNING

Plan & live with purpose



ARE YOU A BUSINESS OWNER, PROFESSIONAL OR EXECUTIVE?



TRANSITION PLANNING IS FOR EVERYONE

After a lifetime of success and achievement, it's unlikely you want a retirement where work grinds to a sudden halt and you're left to figure out the rest.

Transition planning is a crucial step to prepare for your life after work. It's not retirement – it's retirement redefined, tailor made for you. It involves creating a proactive plan for the life you want to lead – not just work, but also considering your family and relationships, health, recreation, mind, spirituality, interests, and community. It's as active as you want to make it. After all, it's your life, and you're in charge.

The investment you make in transition planning now provides lifelong value when you create a new way of living that's deeply satisfying -
The Platinum Years (TM)

Transition planning is for professionals, executives, and business owners who want to plan a transition that's dynamic, ambitious, and life changing by:

- Redefining their lives beyond their existing career and business
- Using a proven, structured, strategic approach
- Creating an action plan with clear, easy steps for both personal and business life
- Preparing well in advance – both emotionally and intellectually
- Considering all options, including easing out of work gradually, maybe starting a new business, or selling an existing business successfully



WHAT DOES IT INVOLVE?

When you come to Transition Planning Australia you can expect the highest level of professionalism, globally proven methodologies and expert advice, and more. You can expect to be challenged. To think outside the box. To move outside your comfort zone. And to pay attention to areas of your life that might be stuck in a holding pattern. Most of all, you can expect to be fully supported by a dedicated consultant as you navigate your future, face your fears, and plan your new life.

MATTERS OF THE HEAD & HEART

We help you work through matters of both head and heart so that you're mentally and emotionally prepared.



How do I transition out of my career or business ownership?



What's the right timing?



How can I prepare?



What income do I need?



Will I still do some work?



How do I exit my business for the best price?



Can I increase the value of my business first?



Who can help me transition out of my business?



What do I still want to achieve?



How do I reconnect with my partner, family & friends?



How will I stay fit and healthy?



How will I feel?



How will I manage others' expectations?



What do I want to give back?



How can I redefine my life?



How do I overcome uncertainty?

PROVEN PROGRAMS, EXPERT ADVICE

We take the time to create a personalised program to suit your busy schedule, drawing on private programs, self-assessments, seminars, workshops, and books. You'll receive a comprehensive, clear action plan, including strategies and steps for both your personal and business life.

We rely on global, proven processes, and we're the only authorised distributor in Australia of training programs and materials from the Successful Transition Planning Institute of Cambridge (Boston) Massachusetts, USA.

WHY IS **TRANSITION PLANNING** FOR ME?

Clients choose to work with us because we understand that transitioning from work is a huge life change that requires careful thought and planning far beyond financial considerations.

Complement existing advisors

We work in close partnership with you and your existing advisors – such as accountants, lawyers, and financial advisors. We help you create your tailor-made transition plan which you can discuss with them.

Inspiration and fresh thinking

It's common to feel tired, stuck in a rut, or to have difficulty imagining a different way of living. We're here to motivate you, inspire you, discover new options you've never considered, and equip you to tackle the changes and challenges ahead.

A professional approach

You'll work with a dedicated consultant who has years of business experience and is highly trained to help you navigate the practical and emotional aspects of your transition journey. We use globally recognised programs and materials from the Successful Transition Planning Institute to ensure your experience is strategic, efficient, and delivers outcomes.

So your transition from work is a planned, proactive, and positive experience.

Contact us today.