



Spotting Halftimers

Which of your clients are in Halftime?

A client in Halftime is:

- > 40 - 65 years of age
- > in mid-life transition (sold company, retired, IPO'd, laid off, etc.)
- > a successful marketplace leader
- > interested in having their second half "count for something"
- > interested in social, cultural, educational and/or spiritual issues
- > charitably-minded
- > Christian in their world view

LISTEN: If your clients say this, they might be in Halftime:

- > "I'm thinking about selling my business."
- > "Our last kid graduated from college. We're finally empty nesters."
- > "My company just IPO'd. How much am I worth?"
- > "Can I afford to quit my job?"
- > "I care about the needs of my community and the world at large, but I don't know where to start to get involved."
- > "I'd like to start a private foundation, but it's confusing. How do I start? What other options are there?"

LOOK: Things to observe in your client:

- > Death in the immediate family
- > Avoiding decision-making
- > Having a scattered lifestyle
- > Client has hit plateau—not growing or declining
- > Person sold their business years ago and is still trying to figure out life
- > At a turning point in their life

ASK: Questions to ask your client:

- > "If we could save you a lot of money in taxes, what dream would you pursue with the money you saved?"
- > "If money were no object, what would you do with the rest of your life?"
- > "If you're 50 today, you're probably going to live until you're 90. Can you see yourself doing what you're doing today for the next 40 years?"

Next actions:

- > If your client is engaged by this discussion about a "second half of significance," we recommend you give them Bob Buford's book, *Halftime* or Lloyd Reeb's book *From Success to Significance*. Then follow up with them in a few weeks to see if they are serious about pursuing a life of purpose and impact. If so, you can invite them to attend a **Halftime Institute** with you or you can recommend they pair up with a trained **Halftime Coach** who can help them discover and design their second half plan.

"For we are God's workmanship, created in Christ Jesus to do good works, which God prepared in advance for us to do."

—Ephesians 2:10

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