



FREQUENTLY ASKED QUESTIONS

WHAT IS HALF-RETIRE?

Half-Retire is a program for any business owner who:

- Does not want to fully-retire but wants to reduce the day-to-day toil of business ownership.
- Cannot afford to retire, i.e., the income stream from the business cannot be replaced by selling it.

Wants their business to run without them, so they can shift from hard-earned income to equity income.

The workshop offers business owners training and coaching to help them better reap the rewards of their hard work.

By using the training, tools, and coaching in the workshop, the business owner is able to dramatically cut the time spent working, so they can enjoy family, friends, travel, and achieve better work-life balance.

WHAT DOES A HALF-RETIRE LICENSEE DO?

Half-Retire licensees deliver the six-session workshop to prospective and current clients. They deliver the pre-packaged training sessions and lead the group discussions. By the end of the program, clients will have a personal blueprint and the tools needed to successfully Half-Retire.

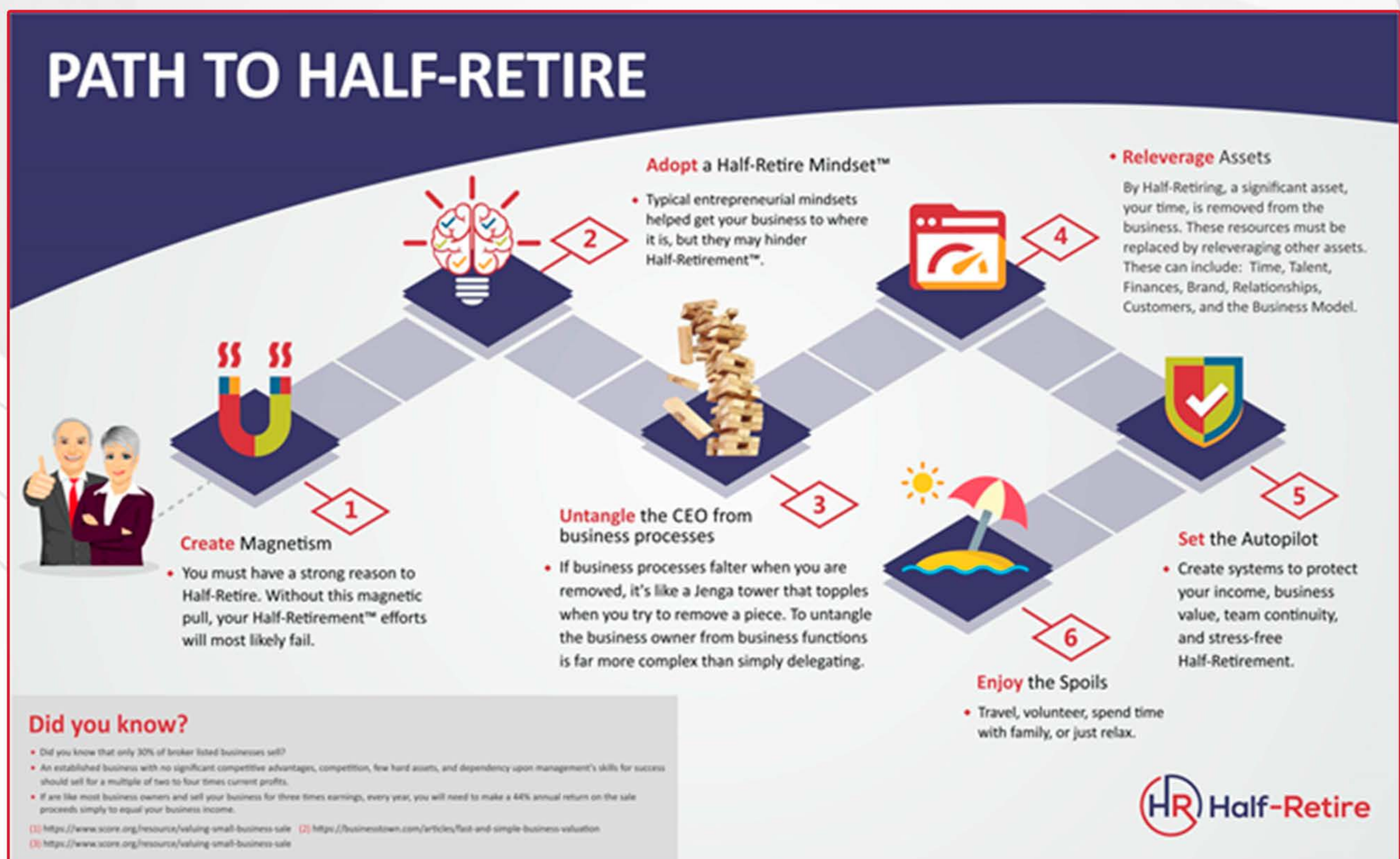
HOW LONG DOES IT TAKE A CLIENT TO HALF-RETIRE?

Saying, "I'm Half-Retired," is a subjective definition. Our goal is to help the owner work as little as two half-days a week, but many clients want to work more than that. Half-Retirement isn't about the number of hours the owner puts in; it's about protecting their income stream and reducing their workload to the tasks they enjoy. If that is zero hours a week, that's great; if that's 30 hours a week, that's fine too.

Most clients make significant during the workshop sessions cutting their undesired workload. However, to get the business running like a Swiss watch without the owner's involvement can take a year or more. This presents an opportunity for licensees to offer follow-on coaching, consulting, and services post-workshop.

HOW CAN THE OWNER WORK **THAT LITTLE TIME?**

Part of the Half-Retire process is a significant shift in mindset. The business owner will not be able to run the business in the exact same way during Half-Retirement as they do today. Many things must change, the first of which is how they see their business and interact with it. Coaching can be invaluable at this stage of the process to help identify problem mindsets and cement new ones. We have seen miraculous results very quickly when the business owner changes their mindset. Below is the six-step framework we use to train business owners how to Half-Retire.



We also have tools, frameworks, and processes we use to cut the demands on the owner. A few of these tools include:

- **The Picasso Work© Framework**
- **98/2 Delegation Technique**
- **F.E.V.E.R. process to reduce workload up to 50%**
- **Using “Culture as Manager in Your Stead”**
- **Mindset remapping**
- **Flash reporting dashboards**

By following the Half-Retire system, the owner has the ability to radically redefine their role in the business and thereby radically reduce their hours.



HOW DO CLIENTS **BENEFIT?**

Half-Retirement radically improves lives. Many of our attendees cannot or do not want to sell their businesses. Many want to transition it to family, but the kids are not quite ready to take over. Others don't want to fully-retire but know they cannot keep up their current pace. Others are in a financial pickle and cannot sell their business for enough to fund their retirement.

The Half-Retire program has helped countless business owners overcome these issues and live happier lives.

WHAT ARE THE TRAITS OF SUCCESSFUL **HALF-RETIRE WORKSHOP LEADERS?**

Ideal candidates will have:

- Well-rounded business expertise, including understanding financial statements.
- Understanding of the small business mentality.
- Ability to lead group discussions.
- Pre-recorded workshop sessions are available with the "Just Hit Play" option, but live delivery is better. Decent public speaking skills are helpful.
- Strong desire to help clients.
- Willingness to follow a proven marketing system.

CAN I GET FOLLOW-ON WORK **AFTER THE WORKSHOP?**

Absolutely. Many licensees use the program as an alternative marketing channel for their existing services, but you can also use the program to:

- Create or grow a new practice area.
- Offer consulting or coaching on Half-Retire topics.
- Create financial management systems and dashboards.
- Help business owners create and execute their exit plan.
- Talent management and acquisition.

HOW LONG HAS **HALF-RETIRE BEEN AROUND?**

The Half-Retire Program was developed in conjunction with our business coaching arm. Since 2001, we have helped thousands of business owners grow, sustain, and enjoy their businesses. As baby boomers started turning sixty-five, we started to see Half-Retire-type issues appearing for our clients. Over time, we formalized our approach, built a robust training system for both business owners and Half-Retire licensees, and fine-tuned our approach.

The Half-Retire Program has been helping business owners de-stress, build wealth, and enjoy their lives more since 2016.

WHAT DO CLIENTS SAY **ABOUT HALF-RETIRE?**

"Ignorance is NOT bliss. I never knew how much I needed this program until I joined! I could not live without my Half-Retire Coach."

"My health thanks you, my wife thanks you, my employees thank you, and I thank you."



"My doctor said that my 'business was costing me heartbeats,' so I knew I had to do something. The Half-Retire Program literally saved my life."

"I was kicking the can on retiring, and now I know why. I never really wanted to retire. Thanks for showing me the path to not retire."

WHERE ARE THE **WORKSHOPS HELD?**

Most licensees host clients in their office or via Zoom. Either format works well with the materials we've created for you.

TELL ME MORE ABOUT THE **MARKETING SYSTEM**

We've created a turnkey marketing system that drives potential participants to an introductory session, then offers enrollment in the full workshop. The template for the session is included in the license materials and can be delivered by you or by our automated webinar system. Licensees receive email templates and ready-to-use marketing materials.



HOW MUCH SHOULD I CHARGE **FOR THE WORKSHOP?**

Our recommended price is \$1500 per company (up to three attendees per company). Some licensees use the program as part of their free client education program, and others give it away to drive demand for the many add-on services that are teed up by the workshop.

WHAT'S INCLUDED IN **THE LICENSE?**

Lots. Just a few of those ways include:

- Attendee kits for every participant
- Turnkey marketing system including an introductory session, automated webinar, train the trainer video, and email templates
- Six workshop presentations, exercises, and group discussion templates
- Train the trainer videos for each workshop session
- "Just hit play" versions of all six sessions
- Copies of our book Half-Retire: Keep Your Business, Ditch the Stress

WHAT'S THE COST OF **THE LICENSE?**

A first-year license fee of \$1999 with an annual renewal of \$999. Each year you receive ten company workshop seat licenses and ten workshop attendee kits. Each attendee kit includes:

- Admission to six workshop sessions
- Participant workbook containing all decks, exercises, cheat sheets, and tools
- A copy of the Half-Retire book



WHAT IS THE **NEXT STEP?**

If you are ready to purchase a license, click here. If you'd like to discuss the program with a representative, here's a calendar link

<https://www.scheduleyou.in/t5Ub3ubk>.

We look forward to speaking soon.