

To the Retiring Executive

Dear Leader,

For decades, your calendar measured success.

Meetings.

Decisions.

Responsibilities.

Milestones.

Now, a different chapter begins.

Retirement is often described as the end of a career.

We see it differently.

It is the beginning of stewardship.

The wealth you accumulated was never simply a reward for your work.

It is a resource that must now support a new purpose.

Perhaps it will create security.

Perhaps it will fund philanthropy.

Perhaps it will strengthen future generations.

Whatever path you choose, your financial strategy deserves to evolve alongside your life.

Retirement is not about withdrawing from purpose.

It is about redefining it.

The greatest achievement is not finishing a remarkable career.

It is ensuring that the success of that career continues creating value long after your final working day.