ONPOINT PRIVATE WEALTH COACHING

THE FREEDOM GAMEPLAN



A successful business should create choices.

A personal strategy for business owners and incorporated professionals who want greater freedom, stronger financial independence, and a future shaped on their terms.

BUSINESS SUCCESS. PERSONAL FREEDOM.

YOU BUILT THE BUSINESS.

Has it been converted into personal freedom yet?

Most business owners focus on growing the business. Far fewer spend time coordinating the personal wealth, tax planning, risk management, retirement strategy and future decisions that ultimately determine how much freedom that success creates.

THE FREEDOM GAMEPLAN CONNECTS THE DOTS

Most business owners have pieces of a plan:

- An investment account
- A corporation
- Insurance
- An accountant
- A lawyer
- Retirement savings
- An eventual exit in the back of your mind

The challenge isn't usually a missing piece. It's that nobody is looking at how all the pieces work together.

The Freedom Gameplan helps you coordinate your business, personal wealth, tax planning, protection and future options into one clear picture.

THE BUSINESS IS ONE LEVER.

Investments, tax, estate, insurance and retirement income are the others.

The output: freedom, flexibility and future options.

THE QUESTION BEHIND THE BUSINESS

You built the business. Did it build the life?

Success can look convincing from the outside: revenue, a strong team, a respected practice, a full calendar. Yet many owners discover that the business has become their largest asset, their primary source of income, and the place where most of their time still goes.

The Freedom Gameplan connects the business you have built to the life you want it to create. It replaces vague ambition with a clear picture of what enough looks like, what must change, and what deserves your attention now.

THE REAL MEASURE

Not simply what the business is worth— but what it makes possible.

01

CLARITY

Define the life, role and pace you actually want.

02

OPTIONALITY

Create more than one credible path forward.

03

CONTROL

Know the next move without carrying every decision.



FREEDOM, MADE PRACTICAL

The business stops setting the terms of your life.

You do not need to leave a business you love. You need the ability to choose your relationship with it. That might mean fewer hours, better boundaries, a leadership team that can carry more, or the confidence to pursue an entirely different chapter.

The outcome is not a generic exit plan. It is a stronger position: personal wealth that is less dependent on the company, a business that relies less heavily on you, and several future options that remain open until you decide.

THE SHIFT

From “I have to” to “I choose to.”

That is what business optionality feels like.

THE OUTCOMES

Four freedoms. One clearer future.

The Gameplan brings the business and personal sides of your life into one deliberate strategy.

01

LIFESTYLE FREEDOM

A business that supports the time, relationships and experiences that matter beyond work.

Your calendar reflects your priorities—not only the demands of the company.

02

FINANCIAL FREEDOM

A clearer view of the lifestyle your wealth can support and the gap, if any, that remains.

Your personal future is not resting on one business or one eventual transaction.

03

BUSINESS INDEPENDENCE

Systems, leadership and accountability that reduce the company's reliance on you.

Time away becomes possible without everything slowing down or coming back to your desk.

04

FUTURE OPTIONALITY

Credible paths to keep, delegate, transition, partially sell, sell, or begin again.

You strengthen choices before you need to make one.

WHAT YOU'LL BUILD

A personalised roadmap for the freedom you want.

The Freedom Gameplan is a personalised roadmap that helps you identify:

- ✓ Your biggest opportunity
- ✓ The improvements with the greatest potential impact
- ✓ The areas that deserve attention
- ✓ The areas you can safely ignore
- ✓ Your next best move

NO PRESET EXIT. NO GENERIC NUMBER. NO PRESSURE.

A plan built around the freedom you want— and the business you own.

YOUR NEXT STEP

How optional is your business today?

The free Business Optional Score takes a few thoughtful minutes. It shows where your business already creates freedom—and the area that could make the greatest difference next.

FREE BUSINESS OPTIONAL SCORE

See where you stand.

Receive your score across lifestyle, personal wealth, business independence, and time and money leverage.

START YOUR FREE SCORE

freedomgameplan.ca/scorecard

OnPoint
PRIVATE WEALTH COACHING