

The Executive Encore: Your 12-Month Roadmap to a Portfolio Career

A practical guide for senior executives considering board, advisory, and fractional CXO roles

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The Grocery Store Moment

You run into an old colleague at the grocery store on a Tuesday morning. They ask, "So, what are you up to these days?"

If you're already retired, you pause.

"Oh, you know... enjoying retirement. Playing some golf. Spending time with the grandkids."

They smile politely. You both know what you really mean: *Nothing much.*

If you're still working but close to the finish line, your answer might be different—but the feeling is the same:

"Still at it. Two more years until I'm out."

They nod knowingly. But inside, you're thinking: *And then what?*

As you walk away, something gnaws at you. You spent 30 years mastering financial strategy, steering companies through complexity, making decisions that mattered. And the next chapter? You haven't figured that out yet. The idea of full retirement sounds... empty. But going straight into another executive role sounds exhausting.

Here's the truth nobody tells you: Retirement gets boring. Not immediately—those first few months feel like freedom. But by month six, the restlessness sets in. Your mind, trained for decades to solve problems and see patterns others miss, needs something to work on.

And here's what nobody tells you when you're still two years out: The executives who land the best board, advisory, and fractional roles didn't start positioning themselves after retirement. They started 18 months before.

You don't want your old job back. You don't want the 60-hour weeks or the office politics. But you do want to matter. You want intellectual stimulation. You want to stay relevant. You want a better answer to that grocery store question—whether it's happening now or two years from now.

This roadmap is for executives who are done apologizing for not being done, and for those who are smart enough to plan ahead.

Why This Matters Now

Whether you've already retired or you're counting down to your exit, you're not alone—and the timing has never been better.

Research from Stanford's Center on Longevity shows that executives who maintain challenging, purpose-aligned work post-career report 40% higher life satisfaction and cognitive engagement scores than those who fully retire. Your instinct to keep working isn't weakness—it's wisdom.

Meanwhile, NACD's 2024 Governance Outlook Report identifies "CEO/CFO experience" as the #1 most sought-after attribute for new public company board members, and demand for fractional CXOs has grown by over 200% since 2021 according to Gartner. Executives who successfully repositioned themselves for board and advisory roles saw a 5x increase in profile views on LinkedIn.

The opportunity is real. The demand is there. But here's what most executives get wrong—whether they're already retired or still in the corner office...

40%

Higher Life Satisfaction

Executives maintaining purpose-aligned
work post-career

200%

Growth in Demand

For fractional CXOs since 2021

5x

Profile View Increase

For executives who successfully
repositioned



The Three Traps Keeping You Stuck

Trap #1: The Resume Trap

You update your LinkedIn with the same task-based resume that got you your last job: "Managed \$500M P&L. Led team of 45. Implemented new ERP system."

But board and advisory work isn't about what you did—it's about what problems you solve. PwC's 2024 Corporate Directors Survey found that 72% of boards seek directors who can reframe operational expertise into governance-level narratives. Your experience has this value—but your current positioning doesn't show it.

Moving from operational leader to governance advisor isn't a career change—it's a translation of your value.

Trap #2: The Networking Trap

You know people. You've built relationships. But those relationships knew you in a role—or still know you in your current role. Now you need them to see you in a new light: as an advisor, a board member, a fractional CXO.

Without a clear narrative about your transition, your network doesn't know how to help you. Harvard Business Review found that executives who secured board seats within 12 months of retirement had begun specific positioning activities an average of 18 months before their exit.

If you're already retired and starting from scratch, you're behind but not out. If you're still working with two years to go, you're perfectly positioned—if you start now.

Trap #3: The Confidence Trap

For those already retired: You've been out of the game for a while. You wonder if you're still sharp enough. You see younger executives with more "current" experience.

For those still working: You're consumed by your current role. You can't imagine having the headspace to think about "what's next" when you're still managing the current quarter.

Either way, the Conference Board notes that boards favor candidates with clear, pre-packaged value propositions over generalized "leadership" backgrounds. You have the expertise—but without clarity on how to articulate it, you second-guess yourself into inaction.



The Board Translator Methodology

This roadmap is built on a structured framework that takes your executive experience and makes it compelling to boards, startups, and organizations that need your wisdom. The methodology works in three phases:



Translate Your Skills

Using objective, proven techniques to translate your operational accomplishments into in-demand corporate governance skills. These skills become the backbone of your leadership brand.

Translate Your Identity

Moving from being defined by what you did (or what you currently do) to confidently describing your next chapter in person and online—from LinkedIn profiles to real conversations.

Translate Your Legacy

Staying relevant by transforming your history of personal achievement into a future of multiplied organizational impact.

Each month of this roadmap applies these translation principles to specific activities that move you from restless retirement—or pre-retirement anxiety—to purposeful encore career.

- A Note on Timing:** If you're still working full-time, this roadmap stretches across 18-24 months instead of 12. You'll move more slowly through each phase, building your positioning while still delivering in your current role. If you're already retired, you can compress the timeline and move faster.



Month 1-3 (or Months 1-6 if still working): Translate Your Skills

The hardest shift isn't finding clients—it's realizing you're no longer selling your time. **You're selling judgment earned over decades.**

This phase focuses on identifying what made you exceptional in your operational role and translating that into governance-level value. Gallup's research on over 10,000 executives shows that leaders who lead with their "Strategic" and "Relationship Building" strengths secure roles 50% faster than those leading with "Executing" themes.

You'll dig through 30 years to find your superpowers—the things CEOs called you for at 10pm. But more importantly, you'll learn to translate those operational wins into the language boards actually speak: enterprise risk, strategic oversight, fiduciary responsibility, stakeholder governance.

This is where your task-based accomplishments become your governance credentials. It's not about what you managed—it's about what you can now advise on. And you'll get brutally specific about who needs that advice, because "I'm open to anything" is career death at this stage.

If you're still working:

You can do this work in stolen moments—weekend mornings, flights, late evenings. The key is starting the mental shift before you need it.

If you're already retired:

You have the time to go deep. Use it wisely.



Month 4-6 (or Months 7-12 if still working): Translate Your Identity

You need one thing before anything else works: a confident, purposeful answer to "What are you up to these days?" or "What's your plan after you leave?"

Not: "Oh, not much. Enjoying some downtime."

Not: "I don't know, I'll figure it out when I get there."

But: "**I'm transitioning into selective advisory work with growth-stage SaaS companies who need CFO expertise to scale without blowing up their cash burn.**"

This is the identity translation phase—moving from being defined by what you did (or currently do) to confidently describing your next chapter. When you can say this with clarity and conviction—at the grocery store, at a dinner party, in a networking conversation—everything changes. Opportunities start finding you.

This phase includes the practical work of visibility and credibility. You'll translate your LinkedIn from a resume into a platform for demonstrating governance-level thinking. You'll create the assets that make it easy for people to understand what you offer and how to engage you.

At this level, opportunities flow to people who demonstrate expertise publicly, not people actively searching. The identity you project determines the opportunities that find you.

If you're still working:

Your LinkedIn updates happen gradually. You're not announcing a transition—you're beginning to share perspectives that position you as a thought leader, not just an operator.

If you're already retired:

You can make bolder moves faster. Your profile can shift completely in 60 days.



Month 7-9 (or Months 13-18 if still working): Network With Intent

Most board seats and fractional roles get filled through personal networks before they're ever posted publicly. But you can't rely on people guessing how to help you.

This phase is about systematic relationship reactivation—not mass outreach, but strategic conversations with the right people. The key is that your network needs to understand your translated identity. When people know you as "the CFO who runs operations," they can't refer you for "the advisor who helps boards navigate M&A integration risk." You have to translate your identity for them.

You'll identify the 50 relationships that matter most and engage them in ways that feel natural, not transactional. You'll learn how to get on the radar of private equity operating partners who maintain short lists for interim leadership needs in their portfolio companies. And you'll identify strategic board placements that build governance credibility while creating collisions with the people who hire advisors.

The relationships were always there. The translation makes them actionable.

If you're still working:

These conversations are easier because you're not desperate. You're planting seeds for 18 months from now. People appreciate the advance notice and want to help.

If you're already retired:

You're working against the perception that you need something. Frame your outreach around sharing your new direction, not asking for help.



Month 10-11 (or Months 19-21 if still working): Perform When It Counts

Heidrick & Struggles' Board Monitor reports the average time from initial board search to seating is 4.9 months. You'll likely have one shot to make your case. Most executives underestimate how rusty their interview skills have become—or how different these conversations are from executive hiring.

This phase covers how to structure engagements that work—moving from salary thinking to retainer and equity models. You'll learn to price based on value, not hours. You'll understand what must be in every advisor agreement to protect yourself.

Most critically, you'll practice translating your value in real-time conversations. Board and fractional interviews aren't about whether you can do the work—they assume you can. They're about whether you'll bring perspective the existing team lacks and whether you'll advise without taking over.

Can you translate 30 years of operational expertise into two minutes of governance value? Can you articulate why your pattern recognition matters more than your task completion? This is where identity translation meets real opportunity.



If you're still working:

Start taking exploratory conversations now. Not for jobs, but to test your positioning. You'll learn what resonates and what doesn't while the stakes are still low.



If you're already retired:

You need to get sharp, fast. Role-play these conversations. Record yourself. Get feedback.



Month 12+ (or Month 22+ if still working): Translate Your Legacy

This is the working retirement you actually wanted—if you set it up right.

Now you're living the final translation: from a history of personal achievement to a future of multiplied organizational impact. The executives who make this work long-term understand that their legacy isn't what they built—it's what they help others build.

You'll have systems for managing multiple clients without burnout. You'll know how to demonstrate value in ways that make renewals automatic. And you'll understand that the best path to a board seat is often performing exceptionally as a fractional advisor first—companies get to test you, you demonstrate value, and the board seat becomes the natural next step.



Three to four clients

At manageable hours per week



Intellectual stimulation

Without the 60-hour grind



Work that matters

On your terms



Relevance

You stay relevant by staying engaged

If you timed this right:

You'll have your first fractional engagement or board role lined up before your last day at the office. You'll walk out of retirement with a plan already in motion.

If you're building this post-retirement:

You'll have traction within 12-18 months of focused effort. Not perfect, but purposeful.



The Grocery Store Moment, Reimagined

Imagine running into that colleague again. This time, when they ask what you're up to, you don't hesitate:

If you're already in your encore career:

"I'm doing fractional CFO work with two PE-backed portfolio companies—helping them scale their finance operations without the cost of a full-time hire. I'm also in conversations about a board seat with a SaaS company in the healthtech space. It's the perfect blend of staying intellectually engaged without the burnout of my old role."

If you're still working but have clarity:

"I've got about 18 months left in my current role, and I'm starting to position myself for advisory and board work. I'm talking to a few PE firms about fractional CFO needs in their portfolios. Should be a smooth transition into the next chapter."

Either way, they lean in. "Really? That sounds amazing. How did you get into that?"

You smile. Because you have a story. You have clarity. You have purpose.

This is what unretirement looks like.

Before You Start: Five Quick Tests

1

The Grocery Store Test

If you ran into a former colleague today, what would you say you're doing (or planning to do)? Would you feel proud of that answer?

2

The Monday Morning Test

If you woke up Monday with a fractional engagement or board meeting on your calendar, would you feel energized or anxious?

3

The Opportunity Test

If the perfect board or advisory role appeared tomorrow, would you be ready to interview for it?

4

The Narrative Test

Can you explain in two sentences why you're the perfect advisor for a specific type of company?

5

The Confidence Test

On a scale of 1-10, how confident are you that you could land a meaningful role in the next 6-12 months?



If you're feeling uncertain about any of these questions, you need translation work.

The Executive Encore: Your 12-Month Roadmap to a Portfolio Career

You've spent decades building expertise that matters. The question isn't whether you have value to offer—it's whether you've translated it into language boards and organizations actually understand.

Some executives figure this out through trial and error, spending 18-24 months spinning their wheels after retirement. Others get intentional—either before they leave their current role or immediately after—and work with someone who has a proven methodology.

The Board Translator Methodology helps executives move from restless retirement (or pre-retirement anxiety) to purposeful encore careers by doing what you can't do alone: translate your value so the right people can actually see it.

The best time to start?

Eighteen months before you retire.

The second-best time?

Right now.