

Navigating a Career Change
as an Executive

2023

CAREER TRANSITION CHECKLIST



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1

Build an expert advisory team.

Advisor	Name & Company	Contact Information
CPA		
Employment Attorney		
Wealth Advisor		
Insurance Advisor		

2

Compare and contrast benefits of your current position with what you'll receive in a new position.

What You Have	What You'll Get
Security, Longevity Benefits (PTO), Equity Incentive, Compensation Grants, Bonus, Reputation	New Opportunities, Ability to Advance, Fresh Start, Access to New Resources, Network Expansion

Similarities

3

Review the whole package, including non-monetary features, and closely evaluate your contract.

Terms of Contract	Notes & Questions
At Will or Contract/ Specific Term	
Base Salary & Bonus Arrangements	
Equity Compensation	
Non-Equity Benefits (Retirement Plan)	
Health Benefits (Medical, Life Insurance, Disability, PTO)	
Perks (Daycare, Parking, Flexible Hours)	
Termination Provisions (Non-Compete, Non-Solicitation, Non-Disparagement, Confidentiality Restrictions)	

4

Negotiate an offer that works for you.

TIP #1

Consider the timing for leverage (such as having multiple job offers or current availability of your skillsets in the workforce).

TIP #2

Negotiate termination provisions on the front-end.

TIP #3

Be honest with yourself. Ask for more time to consider the offer or consult an advisor.

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FAIRPORT WEALTH 

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