

CERTIFICATE IN EXIT PLANNING



Exit
Planning
Institute™

Program Costs

Individual Cost **\$500**

Private Label:

Call EPI for details at (216) 712-4244

For Owners

Get educated on how you can use Value Acceleration Methodology and exit planning to increase the market value of your business and position you for any outcome you want.

For Advisors

Do you have the passion to truly serve the holistic needs of business owners? Join the fastest growing segment in the professional services industry? Explore exit planning and value acceleration and unleash new opportunities.

For Associates

Exit planning is not like other advisory services. The more you know, the better you can support the integrated marketing, sales, and fulfillment needs of your firm.

For Major Firms

The market is moving. Is your firm positioned to be the leaders that your corporate clients can count on to grow their value and unlock the wealth trapped in their business? Private label courses available.

CERTIFICATE IN EXIT PLANNING ONE-DAY COURSE

The Certificate in Exit Planning One Day Program was developed by nationally recognized experts who serve as faculty members for the Exit Planning Institute's Certified Exit Planning Advisor (CEPA) Program. The one day program was designed to take professional advisors, as well as sales and marketing professionals and colleagues of existing CEPAs, through a one day course that gave an overview of the overall Value Acceleration Methodology and provided some insight into the CEPA Program itself.

The program takes the attendee through six modules which concentrate on the core elements of the Value Acceleration Methodology and the organizing principle of the methodology called Master Planning. Master Planning has three critical components referred to as the "three legs of the stool":

- 1. Maximizing Business Value**
- 2. Personal Financial Planning**
- 3. Life After Business Planning**

Participants will also learn to describe deliverables at each of the three major gates of the methodology and understand how the exit planner and the "triggering event" creates action and generates business opportunity and deal flow for other professional advisors while significantly improving value and probability of a successful transaction.

Participants who have successfully completed the one day course receive a Certificate in Exit Planning from the Exit Planning Institute.

After attending this workshop, attendees will able to:

- Communicate the benefits of the Value Acceleration Methodology which focuses on identifying, protecting, maximizing, harvesting and managing owner and family wealth.

- Name and describe the deliverables at each gate of the Value Acceleration Methodology
- Describe how the "triggering event" enlightens owners to take action to begin working on their transition process
- Describe the three critical components of a successful transition process
- Describe the key roles of each of the team members involved in exit planning
- State the statistics from the State of Owner Readiness Survey which describes the current state of owner readiness
- Describe the market opportunity created by the baby boomer generation age wave
- Understand how the exit planner and the "triggering event" creates action and generates business opportunity and deal flow for other professional advisors while significantly improving value and probability of a successful transaction.

ONE DAY PROGRAM HIGHLIGHTS

- Six modules taught in an interactive group setting with case studies
- Overview of the award-winning Value Acceleration Methodology
- Obtain a Certificate in Exit Planning
- Obtain up to 6.5 hours of CE Credit



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