EPI ACADEMY

COURSE CATALOG

Explore Exit Planning Institute's extensive online education offerings taught by industry experts.

AWARD WINNING LEARNING MANAGEMENT SOLUTION

OVER 3,000 ADVISORS EDUCATED

PEOPLE FROM OVER **18 COUNTRIES COMPLETED** AN EPI ACADEMY COURSE

20+ COURSES AVAILABLE

ELIGIBLE FOR CONTINUING **EDUCATION CREDITS** WITH THE FOLLOWING ORGANIZATIONS

EPI	CFP®
CPE	IWI

LETTER FROM SCOTT SNIDER, PRESIDENT OF EXIT PLANNING INSTITUTE

Hey!

As the authority in exit planning, Exit Planning Institute is thrilled to offer over 22 courses to improve an advisor's practice, advance exit planning expertise in the marketplace, and build stronger and more significant companies.

EPI Academy is continued professional development in a convenient way. It provides advisors with a platform to build and advance their practice by completing courses at their own pace online.

Since launching EPI Academy in 2021, we have added more instructors, created more courses, and provided over 3,000 advisors and owners with the insights they need to build value in their organizations before an exit.

A key component of our EPI Academy platform is the tracks that allow advisors to easily find the content and education they are looking for to enhance their practice. These include recommended learning and professional development plans. Throughout this course catalog you will find a variety of exceptional and award-winning courses taught by best-in-class instructors in the field of exit planning.

Exit Planning Institute's purpose is to create Significant Companies. To help business owners create significant companies, we need advisors in our market who surround business owners. EPI Academy allows us to advance the advisors and arm them with the best tools, knowledge, skills, and network.

Enroll in an EPI Academy course today to elevate your exit planning practice!

Scott Snider
President, Exit Planning Institute

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EPI Academy is a state-of-the-art online learning platform with over 20 courses taught by industry professionals with decades of experience. The platform enables advisors to easily find the content and education they are looking for and build ongoing professional development plans. Each course is rich with practical techniques, case studies, and real-world scenarios, ensuring immediate applicability.

Our EPI Faculty is comprised of award-winning Certified Exit Planning Advisors® (CEPA), best-in-class professionals, authors, and business leaders eager to educate the next iteration of exit planning professionals.

EPI Academy Courses are **segmented into five categories**. Advisors can complete courses across all categories for a breadth of knowledge into exit planning strategies and practice enhancements, or explore all courses within a specific category for a more focused approach.

UNDERSTANDING EXIT PLANNING

For those looking to learn more about exit planning concepts, these courses are a perfect place to start. Learn the essential, yet introductory, information needed to kick off your exit planning journey.

BUSINESS VALUATION

Business valuation is fundamental to the exit planning process, and these courses provide you with a better understanding of what generates value for a company. These courses explore the concepts of the Value Acceleration Methodology™ and put it into practice.

PRACTICE MANAGEMENT

Whether you are looking to start your own exit planning practice, or implement exit planning services within an already established one, these courses provide a framework on how to successfully support your business owner clients in this space.

BUSINESS DEVELOPMENT

Improve your marketing and sales strategies to business owners with courses that showcase how exit planning knowledge makes you uniquely positioned to work with your ideal clients.

EXIT STRATEGY

Explore deep dives on specific exit options and see the different ways Value Acceleration can be implemented. These courses allow you to hone in on the areas of exit planning that matter most to you.

> "I DEFINITELY PICKED UP SOME **GOOD IDEAS** I WOULD NOT HAVE THOUGHT OF ON MY OWN."
>
> – Alex Weatherly, CEPA, Estate Planning Attorney, Callison Tighe & Robinson, LLC

> "I'M ALREADY USING A FEW THINGS I LEARNED AND AM EXCITED TO GET TO WORK ON THE OTHER ONES. I'M HOOKED. **THIS WAS THE BEST NEXT STEP FOR MY BUSINESS!**"
>
> – Nicholas Goode, CEPA & LPL Financial Advisor, Vantage Point Planning

> "EXCELLENT MATERIAL AND PRESENTATION. **HIGHLY RECOMMEND TO OTHERS.**"
>
> – Dan Hurley, CEPA, Exit Planner/Value Advisor, Stratecution LLC

WHO ARE THESE COURSES FOR?

EPI Academy courses provide continuing education for advisors from across the exit planning industry. While some courses provide more in-depth knowledge for specific advisor types and specialties, the vast majority of EPI Academy programming is suited for any advisor serving on the business owner's transition advisory team.

When reviewing the courses in this catalog, consult the **Who Should Attend** key to determine which courses are best suited for your role on the exit planning team.

FINANCIAL ADVISOR

The Financial Advisor will ask all the pertinent personal and financial questions to the owner. They remain on the owner's team long after the exit has occurred.

Featured Course:
Implementing Value Acceleration as a Financial Advisor

CPA

The CPA provides a diverse set of services to the business owner along their entrepreneurial journey from tax preparation and advice, to financial statements, forensic accounting, auditing, and valuation.

Featured Course:
Empowering Conversations With Business Owners

ATTORNEY

The attorney provides legal advice on issues that impact the company across all four intangible capitals (Customer, Social, Human, and Structural.) They also play a critical role as a connector, as they may connect the owner to different types of attorneys along the way who help with more personal or personal financial capacities such as Estate Planning.

Featured Course:
Tax Planning for Business Transitions

VALUE ADVISOR

A Value Advisor manages an owner's business value and helps to unlock the wealth trapped in the business. They assess the personal, financial, and business goals of the owner prior to, during, and after their transition from the business.

Featured Course:
Value Growth Case Study

ESTATE PLANNER

An Estate Planner helps you maximize a business owner's wealth effectively while minimizing estate taxes. Their Estate Planner is instrumental in the creation of their Will, any Trusts for their children, and in organizing their charitable contributions.

Featured Course:
Tap Into Your Quiet Confidence and Unlock Engagement Potential

M&A ADVISOR OR INVESTMENT BANKER

These advisors are typically used if the business owner is going to sell to a third party, considered sell-side work. They can also help their client raise money or work on the buy-side.

Featured Course:
Implementing Exit Planning Into Your M&A Practice

RISK ADVISOR

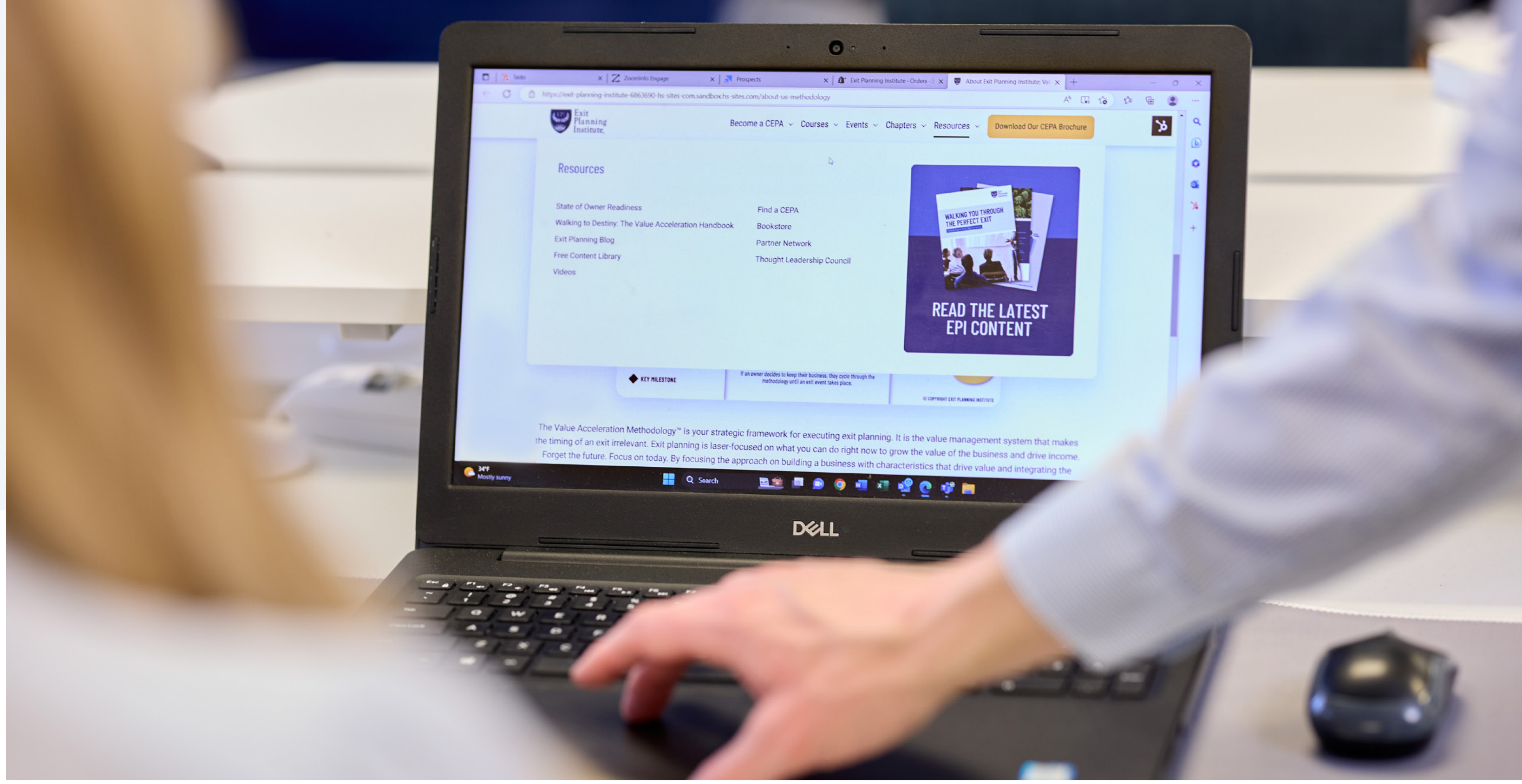
A Risk Advisor works with a business owner to mitigate and manage risks associated with the business and their personal needs. They must understand what risks are lurking in the owner's business and any personal risks associated with it.

Featured Course:
Sell Your Business on Your Terms

FAMILY BUSINESS ADVISOR

A Family Business Advisor is a crucial member of the transition advisory team. They assist in managing collisions between the family and business dynamics.

Featured Course:
Family Enterprise Transitions



WHY VIRTUAL EDUCATION?

Several of our EPI Academy courses now have joint accreditation from the CFP® Board Center for Financial Planning, the Investments and Wealth Institute (IWI), and the National Association of State Boards of Accountancy (NASBA). This allows advisors to leverage the courses for both our Certified Exit Planning Advisor (CEPA) credential, while also meeting certification requirements for other organizations.

"We're proud to partner with leading organizations to provide robust training for their members. EPI wants to ensure we make our education available to as many professionals as possible as business owners typically rely on a team of trusted advisors to guide their future and eventual exit from a company."
- Scott Snider, President of Exit Planning Institute

While exploring the catalog of courses, look for the CFP®, NASBA ,and IWI symbols in the CE Credits section to see what credit hours are applicable for each EPI Academy Course.

NATIONAL REGISTRY OF CPE SPONSORS

CFP BOARD CE QUALITY PARTNER

INVESTMENTS & WEALTH INSTITUTE®

CEPA PROGRAM EXAM PREP COURSE

What is the secret to passing your Certified Exit Planning Advisor (CEPA) Exam? It's as simple as understanding what you need to know on exam day and this course will help you discover that.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

What is the secret to passing your Certified Exit Planning Advisor (CEPA) Exam? It's as simple as understanding what you need to know on exam day.

The comprehensive exam prep course strengthens and reinforces the core competencies required to pass the CEPA Exam. President of Exit Planning Institute, Scott Snider, breaks down the exam and shares insights, tips, and tricks to keep in mind during your study. He is joined by the creator of the Value Acceleration Methodology, author of Walking to Destiny, and Head of CEPA Faculty, Christopher Snider, for an interview of applying the exit planning concepts.

This Three-Module, on-demand, and interactive course, helps CEPA exam candidates simplify their study approach and comprehend the overall body of knowledge.

LEARNING OBJECTIVES:

- Define critical terms, concepts, and calculations
- Review core concepts and statistics
- Answer commonly asked questions
- Discuss the Value Acceleration Methodology with Christopher Snider

MODULES:

Module One: Simplifying the Methodology

- Define critical terms, concepts, and calculations
- Assess the breakdown and layout of the exam structure

Module Two: Understanding the Curriculum

- Review core concepts and statistics from key modules
- Simplify the Importance of Teams and Collaboration and the Exit Options Analysis

Module Three: Applying the Concepts

- Discuss the Value Acceleration Methodology with Christopher Snider
- Answer commonly asked questions

CONTINUING EDUCATION:

EPI Hours: 3

PRICE:

$349

INSTRUCTOR:

Scott Snider
President, Exit Planning Institute

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BASICS OF VALUE ACCELERATION

This course was created as an introduction to exit planning for both business owners and advisors. Kickstart your exit planning education.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

The Basics of Value Acceleration course was created as an introduction to exit planning for both business owners and advisors. During this course, host and EPI President, Scott Snider, will take you through the Value Acceleration Methodology. This methodology was created by Christopher Snider and is seen in the book, Walking to Destiny. Attendees complete the course with a baseline understanding of exit planning and how to help business owners plan for their exit effectively.

LEARNING OBJECTIVES:

- Business types and challenges
- In-depth definition of exit planning and its concepts
- What makes a business ready to transition
- How business value is determined
- Executing an exit strategy

MODULES:

Module One: Understanding Business Types and Challenges

- Recognizing the challenges that today's owners face
- Defining the mindset shifts created by the Value Acceleration Methodology

Module Two: Defining "Exit Planning"

- Labeling and breaking down the "Three Legs of the Stool"
- Analyzing the different paradigm shifts that come from the exit planning process

Module Three: Simplifying the Process

- Understanding the core concepts of the Value Acceleration Methodology
- Putting each concept into action

Module Four: Dissecting the Methodology

- Dissecting owner readiness and business attractiveness
- Identifying and calculating the wealth, profit, and value gaps

Module Five: Implementing the Methodology

- Implementing the process through each gate of the methodology (Discover, Prepare, Decide)
- Organizing each step in the 5 Stages of Value Maturity

Module Six: Building Strong Teams

- Structuring an owner's exit planning team
- Illustrating the ideal core team members

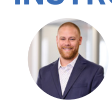
CONTINUING EDUCATION:

EPI Hours: 3
CPE Hours: 2.5
CFP® Hours: 2.5
IWI HOURS: 2.5

PRICE:

$349

INSTRUCTOR:



Scott Snider
President, Exit Planning Institute

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IMPLEMENTING THE 120-DAY CEPA PLAYBOOK

Lay the foundation for implementing the training, tools, and knowledge gained in the CEPA program into your practice.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

You have the Playbook, but do you know how to execute the plays? Knowing and the skills is the first step to a successful practice. However, most advisors fall short when it comes to implementation.

Implementing the 120-Day CEPA Playbook expands upon the playbook you receive in your post-CEPA training. Together with Scott Snider, President of the Exit Planning Institute, you will lay the foundation for implementing the training, tools, and knowledge into your practice. Throughout this course, Scott will help you establish the rhythm of your practice and provide helpful hints and key insights from his own experience. You will learn how to build out exit planning practices, service lines, and marketing programs.

This Three-lesson, on-demand, interactive masterclass equips you with the framework, tools, and knowledge to successfully implement your CEPA training and maximize your return on investment.

LEARNING OBJECTIVES:

- Changing the conversation and understanding core tactics
- Developing your business planning canvas and accountability meetings
- Aligning your exit planning practice and target audience
- Advancing your practice with exit planning concepts

MODULES:

Module One: Building the Momentum

- Changing the conversation and understanding core tactics
- Establishing your rhythm through positioning

Module Two: Picking Your Path

- Developing your business planning canvas and dissecting accountability meetings
- Aligning your exit planning practice and target audience to develop a clear direction

Module Three: Implementing the Skills

- Executing and assessing your strategy
- Advancing your practice with exit planning concepts

CONTINUING EDUCATION:

EPI Hours: 3

PRICE:

$349

INSTRUCTOR:

Scott Snider
President, Exit Planning Institute

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TEAM BUILDING: DEFINING WELL-FUNCTIONING TEAMS

Gain a better understanding of why, when, and where to utilize teams, as well as impactful tools and strategies to put your knowledge into practice.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

It's been estimated that ineffective teamwork results in $1 trillion of economic waste per year. Combine that with virtual work environments becoming more and more commonplace, shifting the dynamic of how teams build trust, and it becomes apparent just how important effective team building is.

This interactive EPI Academy course will take you through the foundational elements of putting a team in place, and how to master behaviors critical to a team's success. This gives attendees a better understanding of why, when, and where to utilize teams, as well as impactful tools and strategies to put your knowledge into practice.

This course was created as an expansion of the team building Module taught within the Certified Exit Planning Advisor (CEPA) program. Current CEPAs will be able to expand on their team-building foundation, but even those without the credential will benefit from the content and strategies taught in this course.

LEARNING OBJECTIVES:

- Deciphering the why, when, and where behind using teams
- Putting the foundational elements of teams in place
- Mastering the Five behaviors crucial for every team
- Analyzing data on the "new normal" for teams
- Developing teams through impactful tools and strategies

MODULES:

Module One: Understanding the New Normal

- Caring about team commitment
- Filling the skill gap

Module Two: Creating the Foundation

- Developing team trust as a foundation of growth
- Defining the Four Assessments of Trust

Module Three: Building the Pyramid

- Expanding team skillsets
- Mastering crucial behaviors

CONTINUING EDUCATION:

EPI Hours: 4
CPE Hours: 3.5

PRICE:

$449

INSTRUCTOR:

Amy Wirtz, CEPA
Consultant, The Family Business Consulting Group

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BUSINESS VALUATION

BUSINESS VALUATION THROUGH THE VALUE ACCELERATION METHODOLOGY

Gain a better understanding of the different valuation solutions that can be used with clients, when to use certain tactics, and how to choose the best partners for your team.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

Business valuation is fundamental to the exit planning process. However, the concepts behind it are often misunderstood and misapplied.

The Business Valuation Through the Value Acceleration Methodology course was created to take attendees through an exploration of business valuation as a continuum. Attendees complete the course with a better understanding of the different valuation solutions that can be used with clients when to use certain tactics, how to choose the best partners for your team, and be a better partner yourself.

LEARNING OBJECTIVES:

- Business Valuation as a Continuum
    - Defining "valuation"
    - Understanding the client lifecycle
- Valuation Solutions
    - Explaining how to use
    - Analyzing different scenarios
    - Calculation of Value vs. Opinion of Value
- Valuation Partners
    - Exploring the benefits of a centralized valuation partner
    - Covering what you should look for in your own partner

MODULES:

Module One: Initial Client Contact

- Considering the different valuation factors
- Reviewing the first steps in the valuation process with clients

Module Two: Discover

- Pushing clients to the prioritized action plan
- Analyzing assessment results

Module Three: Prepare (Business Planning)

- Building a foundation for value enhancement
- Traveling through the valuation funnel

Module Four: Prepare (Personal Planning)

- Establishing personal purpose
- Navigating potential personal and legacy issues

Module Five: Calculation Vs. Valuation

- Differentiating between Calculation of Value vs. Opinion of Value

Module Six: Decide

- Reviewing exit scenarios
- Differing levels of valuation for each exit option

Module Seven: Valuation Partners

- Centralized valuation service advantages
- What to look for in a valuation partner

CONTINUING EDUCATION:

EPI Hours: 2
CPE Hours: 1
CFP® Hours: 1

PRICE:

$349

INSTRUCTOR:

Shina Culberson, CFA, CEPA
President, Quist

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BUSINESS VALUATION

THE TRIGGERING EVENT WORKSHOP: DETERMINING ENTERPRISE VALUE

What's your business worth in the open market? Discover the language, terminology, and numbers involved in the business valuation process, and how they are applied in real-life scenarios.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

What's your business worth in the open market? In The Triggering Event Workshop: Determining Enterprise Value, Exit Planning Institute CEO, Christopher Snider, will take you through the business valuation process. Christopher will break down the language, terminology, and numbers involved so that even those who are not certified professionals in the subject can understand what makes a business valuable.

LEARNING OBJECTIVES:

- The inputs and outputs of a business valuation
- The benefits of a business valuation as a strategic business tool
- How to apply these concepts in real-life scenarios

MODULES:

Module One: The Terminology

- Understanding the approach
- Capitalizing on the benefits

Module Two: The Core Concepts

- Differentiating value vs. income
- Focusing on the "Left" and "Right" side of the equation
- Discovering growth potential

Module Three: The Process

- Business valuation components
- Case study analysis

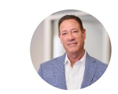
CONTINUING EDUCATION:

EPI Hours: 4
CPE Hours: 3
CFP® Hours: 3

PRICE:

$449

INSTRUCTOR:



Christopher Snider, CEPA
CEO, Exit Planning Institute

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PRACTICE MANAGEMENT

IMPLEMENTING EXIT PLANNING INTO YOUR M&A PRACTICE

Enhance your already established practice by providing clients with a valuable set of new services.

Who should attend:

M&A ADVISOR, INVESTMENT BANKER, ATTORNEY, CPA

COURSE OVERVIEW:

The Implementing Exit Planning Into Your M&A Practice course was designed to provide you with powerful tools and vital information on how to add exit planning services to your already established practice and ultimately make a much more significant impact on the lives of your clients.

Throughout this course, experienced instructor Rick J. Krebs, CEPA, CPA, will use case-study examples to give you a better understanding of how to determine your specific role in the exit planning process, and what updates you'll need to make to your current marketing plan, fee structure, and facilitation techniques along the way.

LEARNING OBJECTIVES:

- Determining your role in the exit planning process
- Developing a way to charge for exit planning services
- Making a significant impact on the lives of your clients, utilizing all areas of exit planning
- Utilizing real-life case study examples to help compare client outcomes
- Implementing exit planning into your marketing strategy
- Supporting your clients through the final decision of the transition process

MODULES:

Module One: Determining Your Role

- Identifying the three different approaches to implementing exit planning

Module Two: Building Trust

- Navigating challenges as an advisor new to exit planning

Module Three: Marketing Outreach

- Advancing your marketing and thought leadership tactics

Module Four: Valuation Types

- Reviewing the three different approaches to valuing a business

Module Five: Prepare Gate Focus Points

- Shifting the client's focus to maximize value

Module Six: Making the Decision

- Choosing a quarterback of the team

Module Seven: In-House Value Acceleration

- Going "hands all in" with the exit planning process

Module Eight: Recap

- Reviewing major points from throughout the course

CONTINUING EDUCATION:

EPI Hours: 3
CPE HOURS: 1.5
CFP® HOURS: 1.5

PRICE:

$349

INSTRUCTOR:

Rick J. Krebs, CEPA, CPA
Head of M&A Division, Business Sales Group

Learn More or Scan The QR Code

PRACTICE MANAGEMENT

CONDUCTING EFFECTIVE CLIENT WORKSHOPS

EPI CEO, Christopher Snider, shows advisors how to use workshops as an effective tool to manage clients through the Value Acceleration Methodology.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

What's the difference between a "workshop" and a "meeting?" This course was designed to show professional business advisors how to use workshops (not meetings) as an effective tool to manage clients through the Value Acceleration Methodology.

Join EPI CEO, Christopher Snider, CEPA, as he takes you through this proven process used with his clients and in his businesses for many years.

Throughout the course, Christopher will walk you through real-life client workshop examples, communication strategies, business development opportunities, and more.

LEARNING OBJECTIVES:

- Reviewing technical, yet introductory, sales and Learning the types of workshops used in each gate of the Value Acceleration Methodology
- Articulating the difference between "workshops" vs. "meetings" to clients
- Organizing and facilitating workshops
- Using tools to facilitate a workshop
- Reviewing workshop examples
- Utilizing workshops as a tool for business development

MODULES:

Module One: What Makes an Effective Workshop

- Developing rhythm
- Reviewing success factors
- Defining "workshops" vs. "meetings"

Module Two: Conducting Workshops

- Facilitating the workshop
- Developing relationships
- Utilizing tools

Module Three: Workshop Examples

- Separating workshops into each gate of the Value Acceleration Methodology
- Reviewing Triggering Event workshop examples

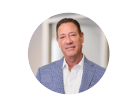
CONTINUING EDUCATION:

EPI Hours: 4
CPE Hours: 3

PRICE:

$449

INSTRUCTOR:



Christopher Snider, CEPA
CEO, Exit Planning Institute

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PRACTICE MANAGEMENT

IMPLEMENTING VALUE ACCELERATION AS A FINANCIAL ADVISOR

See how financial advisors can incorporate the Value Acceleration Methodology into your client services, and your own practice.

Who should attend:

FINANCIAL ADVISOR

COURSE OVERVIEW:

As a financial advisor, you may be asking yourself how you can begin to incorporate the Value Acceleration Methodology into what you do as a fiduciary for your clients, and your practice. This course provides you the knowledge on how to do just that.

Join the 2022 EPI Exit Planner of the Year, Justin Goodbread, CEPA, CFP®, CVGA, as he takes you through the process of utilizing value acceleration to help maximize your client's value and allow them to achieve their goals.

Throughout the course, Justin will walk you through a case study based on a real client, the Hill family, as they explore what it will take to live their desired retirement life.

LEARNING OBJECTIVES:

- Applying value growth concepts with real-life clients
- Determining and planning around a client's Wealth Gap
- Understanding the business behind implementation as a financial advisor
- Utilizing systems and tools to support your marketing and sales efforts

MODULES:

Module One: Quick Review

- Reviewing the Wealth Gap
- Reviewing the Financial Planning Simplified chart

Module Two: Client Experience Case Study

- Breaking down the business, personal, and financial recommendations
- Illustrating the client's progress

Module Three: The Business Behind Implementation

- Determining your role
- Marketing to your target audience

CONTINUING EDUCATION:

EPI Hours: 3
CPE Hours: 2
CFP® Hours: 2

PRICE:

$349

INSTRUCTOR:

Justin Goodbread, CEPA, CFP®, CVGA
President, WealthSource Partners, LLC

Learn More or Scan The QR Code

PRACTICE MANAGEMENT

ACCELERATE YOUR EXIT PLANNING PRACTICE

Join award-winning CEPA, Julie Keyes, as she takes you through everything she has learned over the years in building a successful exit planning practice.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

As a professional advisor, consistently executing within an established system provides you with significantly more potential to grow your practice faster and bigger than if you followed no plan.

During this course, presenter Julie Keyes (value advisor, author, podcaster, and award-winning CEPA), will take you through everything she has learned and experienced in building her exit planning practice. This will give you a better understanding of key areas to focus on to implement these strategies and systems into your own business.

LEARNING OBJECTIVES:

- Identifying critical goals, initiatives, and KPIs for your practice
- Planning and implementing a strategy around exit planning services
- Growing your practice significantly with consistent execution

MODULES:

Module One: Getting Your Practice Off the Ground (Strategic Planning)

- Reviewing strategic planning basics
- Comparing business plan vs. strategic plan

Module Two: Building Your Collaborative Team

- Determining internal and external team members
- Handling collaboration resistance

Module Three: Staying Motivated

- Identifying obstacles to your success
- Sticking with your plan

Module Four: How to Build the Business (Spreading the Word)

- Becoming known in your industry
- Establishing yourself as a thought leader

Module Five: Mastering Practice Execution

- Organizing processes and systems
- Determining KPIs

CONTINUING EDUCATION:

EPI Hours: 4
CPE Hours: 2.5

PRICE:

$449

INSTRUCTOR:

Julie Keyes, CEPA
Founder and Owner, KeyeStrategies, LLC

Learn More or Scan The QR Code

PRACTICE MANAGEMENT

PRACTICE LAUNCH LITE

It isn't enough to hold a credential. You must know how to position yourself in the marketplace for business development, practice management, and client delivery success.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

What do you do after the CEPA credentialing program? How do I launch a practice? How do I engage business owners? It isn't enough to hold a credential. You must know how to position yourself in the marketplace for business development, practice management, and client delivery success.

Practice Launch Lite helps exit planning advisors create action plans to implement exit planning services into an existing or standalOne firm. Join Scott Snider, President of the Exit Planning Institute, as he shows advisors how to navigate and use the CEPA Platform offered by EPI, ideas on how to create awareness and drive new business, and how the value of being a part of EPI can generate new business for you when properly utilized. This Three-Module, on-demand, interactive course enables advisors to construct a thriving and profitable exit planning practice.

LEARNING OBJECTIVES:

- Defining the formula to connect with owners and trigger action
- Developing your target audience
- Preparing your go-to-market strategy
- Managing engagements and growing your practice

MODULES:

Module One: Changing the Conversation

- Defining the formula to connect with owners and trigger action
- Assessing key conversation starters and delivery tools

Module Two: Identifying Ideal Customers

- Developing and engaging your target audience
- Recognizing how to fill your funnel with your ideal client

Module Three: Delivering Client Work

- Preparing your go-to-market strategy
- Managing engagements and growing your practice

CONTINUING EDUCATION:

EPI Hours: 4

PRICE:

$449

INSTRUCTOR:

Scott Snider
President, Exit Planning Institute

Learn More or Scan The QR Code

BUSINESS DEVELOPMENT

EMPOWERING CONVERSATIONS WITH BUSINESS OWNERS

Explore the Five most critical conversation starters you can have with current and potential business owner clients.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

What is an "empowering conversation?" When it comes to discussing exit planning with your clients, it's the catalyst for triggering owner action.

This course shows you as an advisor how to deploy these conversations, better engage clients, and change the standard business owner mindset.

LEARNING OBJECTIVES:

- Understanding the different generations of business owners
- Analyzing the formula to trigger owner action
- Reviewing the Five key conversation starters
- Describing what creates an empowering conversation

MODULES:

Module One: Laying the Foundation

- Reviewing the formula to trigger owner action
- Understanding the different generations of owners

Module Two: 5 Stages of Value Maturity

- Breaking down the what, when, and why behind the conversation starter
- Using tools to explain the concept to clients

Module Three: 4 Intangible Capitals

- Breaking down the what, when, and why behind the conversation starter
- Using tools to explain the concept to clients

Module Four: 3 Legs and Gaps

- Breaking down the what, when, and why behind the conversation starter
- Using tools to explain the concept to clients

Module Five: 2 Concurrent Paths

- Breaking down the what, when, and why behind the conversation starter
- Using tools to explain the concept to clients

Module Six: 1 Goal - Value

- Breaking down the what, when, and why behind the conversation starter
- Using tools to explain the concept to clients

CONTINUING EDUCATION:

EPI Hours: 3
CPE Hours: 1.5
CFP® Hours: 1.5

PRICE:

$349

INSTRUCTOR:

Scott Snider
President, Exit Planning Institute

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MAKING REFERRALS PREDICTABLE

Implement a new set of action steps into your sales strategy that ensures advisors' consistent new business through an engaging referral system.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

When cold calls, paid ads, and other traditional sales and marketing efforts aren't having the impact you'd hoped for, where else can you turn to find new reliable revenue sources?

Having a dedicated referral system will put you on the right path for a more consistent, and personalized, revenue growth strategy. The Making Referrals Predictable course will take you through the entire process of implementing these key strategies, and provide a set of immediate action steps for you to take along the way.

LEARNING OBJECTIVES:

- Analyzing the numbers, process, and concepts behind consistent referrals
- Utilizing macro strategies to fit referrals into almost any conversation
- Creating focused efforts within your network using micro strategies

MODULES:

Module One: Overview of the System

- Calculating your numbers
- Understanding risk
- Building woodpiles

Module Two: Macro Strategies

- Becoming a referral concierge
- Explaining "I Love Referrals"
- Hosting catalyst events

Module Three: Micro Strategies

- Filling the woodpile
- Finding the right fit
- Sharing your passions

CONTINUING EDUCATION:

EPI Hours: 3
CPE Hours: 2

PRICE:

$349

INSTRUCTOR:

Mike Garrison
Founder, Values Based Mindset LLC

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SELLING TO BUSINESS OWNERS

Learn how to identify, attract, nurture, and close qualified candidates in your target market of business.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

Advisors with exit planning knowledge are uniquely positioned to work with business owners. The Selling to Business Owners Course shows advisors how to leverage that knowledge through marketing and business development efforts.

This course provides you with a better understanding of how to identify, attract, nurture, and close qualified candidates in your target market. Leaning on the concepts of the Value Acceleration Methodology, Three course instructors specializing in value growth, marketing, and business development respectively, will show advisors how to differentiate themselves from the competition in a crowded, fast-paced market.

LEARNING OBJECTIVES:

- Reviewing technical, yet introductory, sales and marketing strategies
- Differentiating yourself from other advisors to prospects as an exit planning advisor
- Pushing qualified business owner prospects through the "funnel"
- Understanding the language and tactics to use when targeting business owners
- Utilizing systems and tools to support your marketing and sales efforts

MODULES:

Module One: The Foundation

- Defining your role as an exit planning advisor
- Understanding the language and tools to use with business owners

Module Two: Integrated Marketing

- Identifying your target markets
- Leveraging various marketing channels to promote yourself to prospects

Module Three: Business Development Strategy

- Creating your sales playbook
- Shifting your mindset and approach to targeting business owners

CONTINUING EDUCATION:

EPI Hours: 4
CPE Hours: 3.5

PRICE:

$449

INSTRUCTORS:

Scott Snider
President, Exit Planning Institute

Paige Wysocki
Director of Marketing, Exit Planning Institute

Jesse Hudson
Director of Business Development, Exit Planning Institute

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BUSINESS DEVELOPMENT

TAP INTO YOUR QUIET CONFIDENCE AND UNLOCK ENGAGEMENT POTENTIAL

Explore the process of attracting, engaging, and retaining clients by utilizing a new set of communication and counseling tools, instead of the standard technical Ones.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

We all wish business advisory work was just about our technical ability. But today's clients require more, they require advisors with quiet confidence.

This course was created to take you through the process of attracting, engaging, and retaining clients by utilizing a new set of communication and counseling tools, instead of the standard technical Ones.

LEARNING OBJECTIVES:

- Gaining client commitment and having them see the process through to the end
- Educating clients without feeling like you are "selling" to them
- Implementing actionable tools into their practice to stand out from the competition with a higher-quality experience

MODULES:

Module One: Language and Tools

- Describing the process in a way anyone can understand
- Navigating "The Art and Science of Helping Others"

Module Two: Culture and Process

- Separating Product & Strategy vs. Benefit & Process
- Establishing a general meeting process with clients

Module Three: Curiosity

- Getting to the heart of highly relevant matters
- Understanding how curiosity is a key to client engagement

Module Four: Client Facilitation

- Guiding towards a client's Summary to Action
- Narrowing down client choices

Module Five: "My Success" - Exercise

- Defining what success looks like for you and your client

Module Six: Meeting Scenario

- Outlining best practices for engaging new clients

Module Seven: Meeting Protocols

- Showcasing example meeting protocols to implement

CONTINUING EDUCATION:

EPI Hours: 2
CPE Hours: 2
CFP® Hours: 2

PRICE:

$349

INSTRUCTOR:

Joe Strazzeri, Esq., CEPA
Co-Founder and Principal, The Founders Group; Attorney & Counselor at Law - Partner, Strazzeri Mancini, LLP; Co-Founder and Principal, Southern California Institute

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EXIT STRATEGY

ESOP FAQS

Be prepared for your clients' questions on a traditionally misunderstood exit option.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

In the exit planning space, ESOPs are often misunderstood. The nuances of what it takes to do an ESOP tends to eliminate the pool of business advisors that can properly explain it to an owner.

The ESOP FAQs course was created to make sure you don't fall into this same dilemma with your own clients. Taking a deep dive look into some of the most frequently asked questions that are seen in the marketplace regarding employee stock ownership plans.

This course ensures that professional business advisors are prepared for the series of questions most owners have when exploring ESOPs as an exit strategy.

LEARNING OBJECTIVES:

- Explaining the complexities of ESOPs to business owner clients
- Understanding some of the most often overlooked concepts behind how to establish an effective ESOP
- Defining the different pros and cons of implementing an ESOP

MODULES:

Module One: What is an ESOP?

- Defining an Employee Stock Ownership Plan

Module Two: How Do ESOPs Work?

- Charting out each entity that makes up an ESOP

Module Three: What Makes a Good ESOP Candidate?

- Having success when implementing an ESOP

Module Four: Starting an ESOP

- Going through the first steps of implementing an ESOP

Module Five: ESOP Comparisons

- Comparing common scenarios within an ESOP

Module Six: ESOP What If's

- Making decisions depending on how the ESOP plays out

Module Seven: ESOP Tax Considerations

- Breaking down Section 1042

Module Eight: Summary

- Reviewing key takeaways from the course

CONTINUING EDUCATION:

EPI Hours: 3
CPE Hours: 1.5
CFP Hours®: 1.5

PRICE:

$349

INSTRUCTOR:

Keith Apton, CEPA
Managing Director for The Capital ESOP Group | UBS Private Wealth Management

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EXIT STRATEGY

TAX PLANNING FOR BUSINESS TRANSITIONS

Learn both the tax side of M&A deals and the gift and estate tax planning side, with the ultimate goal of mitigating tax costs at the time of exit.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

As an advisor to high-net-worth clients, it's critical to begin tax preparations for a sale as early as possible, supporting owners from the letter of intent to post-sale planning.

In Tax Planning for Business Transitions, our expert panel of Three industry veterans will take you through the different tax aspects that both owners and advisors should consider when it comes time for the owner to sell their company.

This course provides you with a better understanding of both the tax side of M&A deals, and the gift and estate tax planning side, with the ultimate goal of mitigating tax costs at the time of exit.

LEARNING OBJECTIVES:

- Differentiating between the various types of business entities a company can be taxed as
- Navigating tax aspects of business sales
- Understanding the gift and estate tax planning side of business sales
- Reviewing pre-sale income tax planning strategies
- Mitigating tax costs at the time of exit

MODULES:

Module One & Two: C Corp Scenario
- Relevant considerations for a business taxed as a C corp

Module Three, Four, & Five: S Corp Scenario
- Relevant considerations for a business taxed as an S corp

Module Six: Partnership Scenario
- Relevant considerations for a business taxed as a Partnership

Module Seven: Pre and Post-Sale Considerations
- Tax and estate planning discussions near closing and after the sale

Module Eight: Leadership Team Compensation
- How other members of the business can share in capital gain income post-transaction

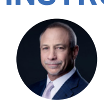
CONTINUING EDUCATION:

EPI Hours: 3
CPE Hours: 2.5
CFP® Hours: 2.5

PRICE:

$349

INSTRUCTORS:



Brad Barros, CEPA
President & CEO, Private Risk Capital Development Advisors, LLC

Jess Bahs, JD, LLM
Attorney Partner, FisherBroyles, LLP

Gal Kaufman
Partner, FisherBroyles, LLP

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EXIT STRATEGY

VALUE GROWTH CASE STUDY

See how a Value Acceleration plan can play out with examples from an industry expert.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

The Value Growth Case Study was designed to provided a deep dive look into how Value Growth Advisors play a role in the Value Acceleration process. The case study created for this course illustrates in real time what to look for, how to prepare, and how the process can play out over time.

Join veteran CEPA, Sean Hutchinson, as he looks to provide you with a better understanding of how the Value Acceleration process can play out, and how to identify the value drivers and killers along the way.

LEARNING OBJECTIVES:

- Understanding the role of the Value Growth Advisor and how a Value Acceleration plan could play out
- Evaluating the pros and cons of a keep/sell decision
- Estimating financial impact and ROI for Value Acceleration
- Understanding value domains
- Identifying value drivers and killers
- Seeing a business through the eyes of an investor

MODULES:

Module One: Fundamentals
- Explaining Value Acceleration to owners

Module Two: Meeting the Owner Where They Are
- Discussing the different categories owners can fall into

Module Three: Value Growth Discover
- Describing the flow of the value growth process

Module Four: Case Study Overview
- Reviewing the backstory

Module Five: Top Level Discover Results
- Reviewing the headwinds and tailwinds of the company

Module Six: Deciding on Your Path Forward
- Determining what the value goal is

Module Seven: Valuation Impacts
- Showcasing value growth results

CONTINUING EDUCATION:

EPI Hours: 4
CPE HOURS: 3.5
CFP® HOURS: 3.5

PRICE:

$449

INSTRUCTOR:

Sean Hutchinson, CEPA, CMMA
Partner, Strategic Development (USA), RFN Global

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PRIVATE EQUITY DEEP DIVE

Get a better grasp of the investment process, from the beginning stages of sourcing a transaction, all the way until exit.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

This EPI Academy course was designed to take you through the private equity investment process. Utilizing a case study example that showcases what takes place in the beginning stages of sourcing a transaction, all the way until exit.

In this course, you'll hear from industry expert, Bobby Kingsbury, Managing Director at MCM Capital Partners, as he gives you a better understanding of what makes your client's attractive to private equity firms, what steps are taken post acquisition, and how to determine if private equity is the right fit to help your clients achieve their goals and objectives.

This course was created as an expansion of the private equity Module taught within the Certified Exit Planning Advisor (CEPA) program. Current CEPAs will be able to expand on their private equity foundation, but even those without the credential will benefit from the content and strategies taught in this course.

LEARNING OBJECTIVES:

- Making a business attractive to private equity companies
- Understanding each element of the investment process
- Determining if private equity is a viable option for your business owner client
- Continuing work post-acquisition

MODULES:

Module One: Buy Right

- Sourcing and investment strategy
- Key components to purchase price

Module Two: Run Right

- Showcasing how to improve organizational efforts through a case study example

Module Three: Sell Right

- Creating value-added exits
- Outlining sale process from pre-acquisition to exit

CONTINUING EDUCATION:

EPI Hours: 4
CPE Hours: 3
CFP® Hours: 3

PRICE:

$449

INSTRUCTOR:

Bobby Kingsburry
Managing Director at MCM Capital Partners

Learn More or Scan The QR Code

THE 21-STEP GUIDE TO SUCCESSION AND EXIT PLANNING

Learn a unique approach to Value Acceleration and how it can be adapted to fit each advisor's needs.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

As taught in the Certified Exit Planning Advisor (CEPA) program, the Value Acceleration Methodology was designed to be foundational and adaptable, so that different advisors can morph it into their different business models as needed.

In The 21-Step Guide to Succession and Exit Planning, you'll hear from veteran CEPA, Dr. Craig West, founder of Capitaliz and Succession Plus, as he takes you through his own proven 21-step process, used with over 800 business owners to help maximize business value and achieve a successful exit.

LEARNING OBJECTIVES:

- Understanding the critical factors to developing a successful exit plan
- Breaking down each of the Five stages within the 21-step succession guide to get a clear few on how this can be approached
- Analyzing how advisors can implement this methodology into their own practice and with their own clients

MODULES:

Module One: Identify Value

- Determining business goals and outcomes

Module Two: Business Insights Report

- Reviewing what data is presented to the owner

Module Three: Business Insights Report (Cont.)

- Reviewing what data is presented to the owner

Module Four: Protect Value

- Creating the financial plan

Module Five: Maximize Value

- Determining the ideal exit option

Module Six: Maximize Value (Cont.)

- Covering more elements that add to value growth

Module Seven: Extract & Manage Value

- Conducting tax planning, asset protection and more

Module Eight: Utilizing Exit Planning Software

- Reviewing how to use software throughout the 21-step process

CONTINUING EDUCATION:

EPI Hours: 2
CPE Hours: 1.5
CFP® Hours: 1.5

PRICE:

$249

INSTRUCTOR:

Craig West, CEPA
Founder, Capitaliz and Succession Plus

Learn More or Scan The QR Code

FAMILY ENTERPRISE TRANSITIONS

Develop a roadmap to success for family businesses and ensure each generation in the process is prepared.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

When working through the Value Acceleration process with a family enterprise, it's crucial to include the entire family along the way, not just the exiting owner.

The Family Enterprise Transitions course was created to give advisors a deep dive look into how they can help their business family clients transition successfully to the next generation.

Learn how to evaluate the readiness of family enterprises for transition, prepare the next generation for success, and shift from an owner focus to a family focus.

LEARNING OBJECTIVES:

- Identifying and explaining the transition process in family enterprises and its elements
- Describing the factors that advisors need to consider in preparing the transition of a family enterprise
- Recognizing the challenges that business families can face before, during, and after a transition, and some ideas of how to navigate them
- Outlining how advisors can help business families in planning for transitions

MODULES:

Module One: Understanding Transitions in Family Enterprises

- Exploring succession drivers
- Outlining the complexity of family transitions

Module Two: Relevant Transitions Factors

- Organizing the facets of cohesion
- Working towards family maturity

Module Three: Next Gen Family Members

- Preparing next generation members to be ready for succession
- Perceiving legitimacy

Module Four: Evaluating Readiness

- Differentiating between business readiness and family readiness

Module Five: Developing a Roadmap

- Walking through the step-by-step process of transition

CONTINUING EDUCATION:

EPI Hours: 3
CPE Hours: 2
CFP® Hours: 2

PRICE:

$349

INSTRUCTOR:

Isabel Botero, Ph.D., CEPA
Fisher Chair of Family Entrepreneurship at the University of Louisville | Advisor at Generation6 Family Enterprise Advisors

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SELL YOUR BUSINESS ON YOUR TERMS

Get the M&A process started and work towards properly preparing a business owner for a fulfilling transition.

Who should attend:

FINANCIAL ADVISOR, CPA, ATTORNEY, VALUE ADVISOR, ESTATE PLANNER, M&A ADVISOR OR INVESTMENT BANKER, RISK ADVISOR, FAMILY BUSINESS ADVISOR

COURSE OVERVIEW:

Naturally, when an owner thinks about selling or transferring their business, they want to get full value for it, reaping the rewards of their labor.

The reality is that many business owners won't be able to sell their businesses when they're ready. Why? Because they didn't take the critical steps to prepare for that transition.

During this course, instructor Scott Bushkie brings over 20+ years of experience in the M&A industry to help business advisors through the process of properly preparing a business for the transition, understanding the value drivers behind it, and ultimately leading your clients to a successful and fulfilling exit.

LEARNING OBJECTIVES:

- Starting the M&A conversation and process with clients.
- Taking a holistic approach to tackling the challenges a business owner faces before and after transition.
- Facilitating exit planning discussions through exercises.
- Maximizing what matters most to the business owner.

MODULES:

Module One: Starting "The Conversation™"

- Asking clients the critical questions to start the process

Module Two: Learning What Matters Most to Owners

- Reviewing common deal priorities owners may have
- Questions to ask before choosing a buyer

Module Three: Weighing the Exit Options

- Outlining required skills for the business successor

Module Four: Transitioning to Family or Management

- Outlining required skills for the business successor

Module Five: When to Sell (and When Not To)

- Avoiding burnout at the finish line

Module Six: How to Avoid Seller's Remorse

- Helping owners to live their best life post-transition

Module Seven: Not All Buyers Are Created Equal

- Charting out business value characteristics

Module Eight: Building Value Before a Sale

- Working ON the business vs. IN the business

Module Nine: Recap

- Reviewing major points from throughout the course

CONTINUING EDUCATION:

EPI Hours: 4
CPE Hours: 3
CFP® Hours: 3

PRICE:

$449

INSTRUCTOR:

Scott Bushkie
Managing Partner and Founder, CornerstOne Business Services

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BULK ORDERS

Are you interesting in creating a custom curriculum for yourself or other advisors in your practice?

Contact Josh Koza, EPI's Manager of Strategic Relationships, to learn more about our custom package options, bundle promotions, and bulk purchasing!

Email Josh at jkoza@earncepa.com.

BUNDLES AND CUSTOM OPTIONS

CONTINUING EDUCATION BUNDLE

A curated assortment of courses for professional advisors to get the education needed to be successful in the industry while simultaneously helping to meet the continuing education (CE) requirements for multiple credentials.

CE Hours Available: EPI, CPE, CFP®

INCLUDED COURSES:

- Value Growth Case Study
- The Triggering Event Workshop: Determining Enterprise Value
- Empowering Conversations with Business Owners
- Business Valuation Through the Value Acceleration Methodology
- Tap Into Your Quiet Confidence and Unlock Engagement Potential
- Private Equity Deep Dive
- Sell Your Business on Your Terms

UNDERSTANDING EXIT PLANNING BUNDLE

A collection of five informative EPI Academy courses designed to provide business owners and advisors with essential, yet introductory, concepts to exit planning and Value Acceleration.

CE Hours Available: EPI, CPE, CFP®, IWI

INCLUDED COURSES:

- Basics of Value Acceleration
- The Triggering Event Workshop: Determining Enterprise Value
- Empowering Conversations with Business Owners
- Business Valuation Through the Value Acceleration Methodology
- Team Building: Defining, Building, and Leading Well Functioning Teams

PRACTICE MANAGEMENT BUNDLE

A collection of four strategic EPI Academy courses designed to empower advisors with the essential skills and insights needed to excel when looking to implement exit planning and Value Acceleration into their advisory practice.

CE Hours Available: EPI, CPE, CFP®

INCLUDED COURSES:

- Practice Launch Lite
- Accelerate Your Exit Planning Practice
- Conducting Effective Client Workshops
- Implementing Value Acceleration as a Financial Advisor

BUSINESS DEVELOPMENT BUNDLE

A collection of four EPI Academy courses designed to provide advisors with the tools and resources needed to excel in their sales and marketing efforts.

CE Hours Available: EPI, CPE, CFP®

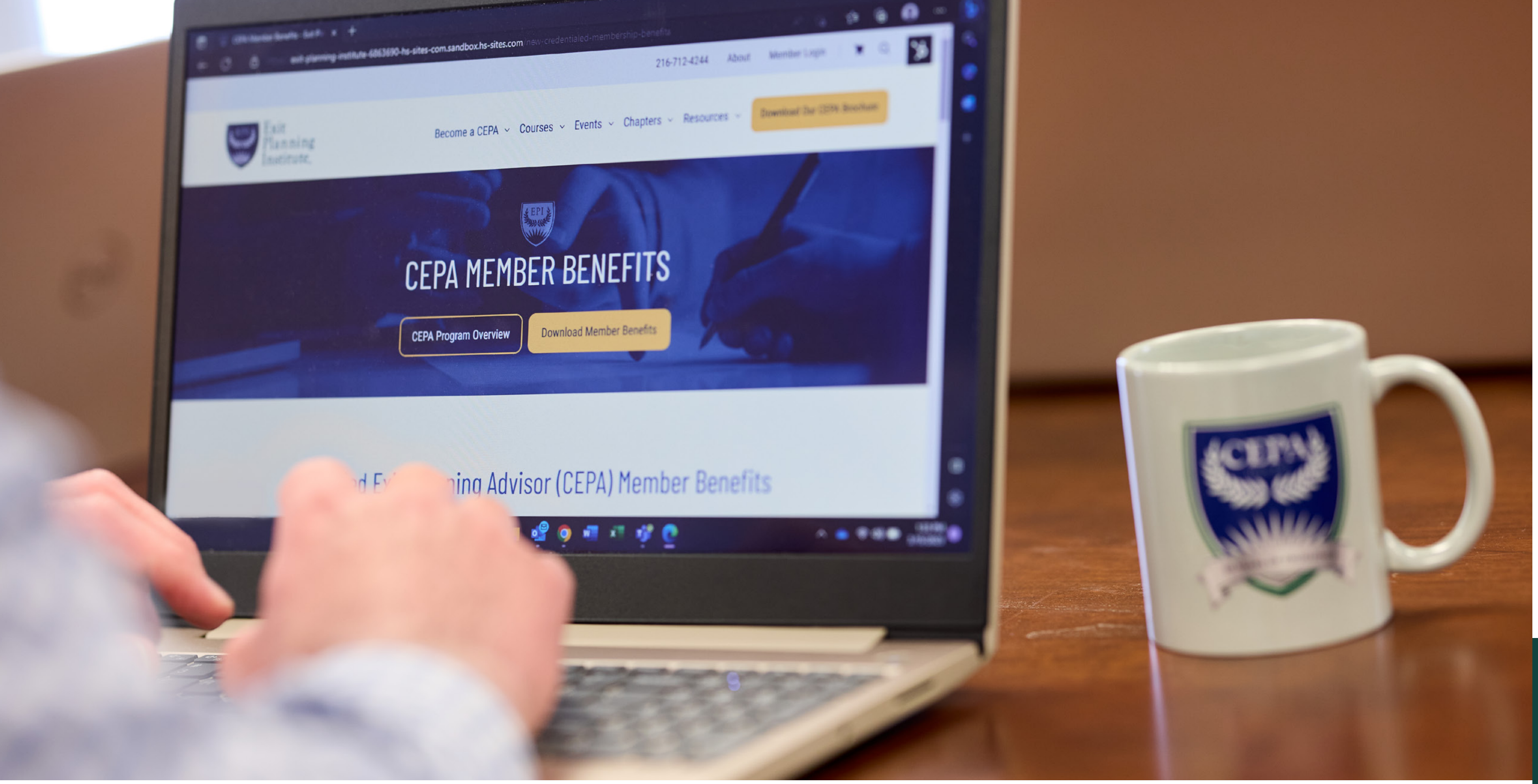
INCLUDED COURSES:

- Selling to Business Owners
- Making Referrals Predictable
- Empowering Conversations With Business Owners
- Tap Into Your Quiet Confidence and Unlock Engagement Potential

CREATE YOUR OWN EPI ACADEMY BUNDLE

Personalize your exit planning path. Select four EPI Academy courses of your choice and receive them all for one discounted price.

Learn more at EPIAcademyCourses.com



LOOKING FOR MORE EXIT PLANNING EDUCATION? BECOME A CEPA®!

The Certified Exit Planning Advisor® (CEPA) credential is for professional advisors who want to effectively engage more business owners. Through the process of Exit Planning (the Value Acceleration Methodology™), owners can build more valuable companies, have stronger personal financial plans, and align their personal goals. Earning CEPA doesn't change your expertise, it enhances your ability to engage business owners and have value-added conversations around growth and exit.

EARNING CEPA IS FOR THOSE WHO WANT TO:

- Differentiate yourself from the competition
- Gain better access to business owners
- Become more engaged on a business owner's advisory team
- Have deeper and more holistic conversations with business owners
- Grow your referral network of professional advisors
- Access hundreds of marketing and business development tools tailored for owners

Learn more about the **CEPA credential** and see if it is right for you at

EarnCEPA.com

BUILDING SIGNIFICANT COMPANIES

The purpose of EPI is to help business owners grow more significant companies. Most believe the business comes first. Rather, the leading element to achieving this goal is personal planning. The business is just another asset in the owner's overall portfolio. By leading with personal planning, the owner will venture toward a significant company. One that is highly valuable, transferrable, ready, and attractive while aligning with the owner's personal and financial goals. Giving them a more balanced and fulfilling life today and no regrets in the future.

Join us on **our mission** and **help your owners build significance** in their companies today!

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