

WELCOME TO YOUR
Beyond **CEPA Path**

A Roadmap for Implementation, Integration, Growth, and Expertise.

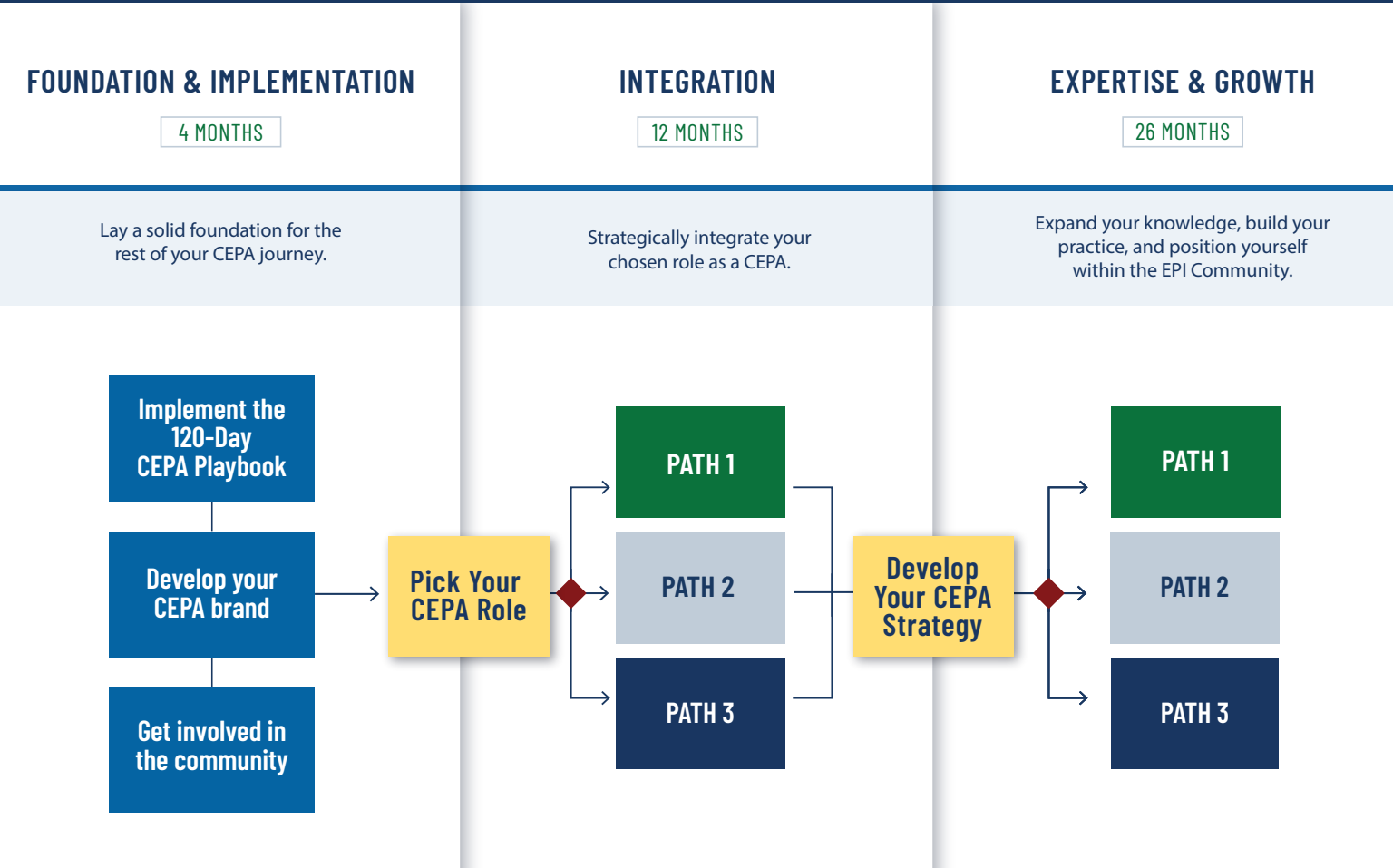


Why the *Beyond* CEPA Path Matters

The Beyond CEPA Roadmap is designed to provide Certified Exit Planning Advisors (CEPAs) with a clear, actionable path for their professional growth and engagement within Exit Planning Institute's community after obtaining their CEPA® credential.

The roadmap outlines three key phases—Foundation & Implementation, Integration, and Expertise & Growth—guiding CEPAs through decision points and milestones that support them in deepening their expertise, expanding their networks, and increasing their impact. Beyond being a tool for professional development, the roadmap serves as a gateway to the broader Exit Planning Institute® (EPI) community by highlighting additional offerings such as the EPI Academy, the Exit Planning Summit, and exclusive access to networking and educational resources. This roadmap also incorporates tangible benefits like swag items and membership perks, enhancing the sense of belonging and ensuring CEPAs feel fully integrated into the EPI community. This roadmap is more than a guide; it is a dynamic tool that empowers CEPAs to navigate their journey with confidence and purpose, ensuring long-term success and significance in the exit planning field.

THE BEYOND CEPA PATH



Path 1: Focuses on deeper, holistic conversations with business owners and connects with like-minded advisors to drive new opportunities.

Path 2: Manages and coordinates the Value Acceleration Methodology™ or one of its key paths within the Prepare Gate.

Path 3 : Leads the business improvements path, creating action plans and guiding the owner through exit options and value acceleration efforts.

Your *Beyond* CEPA Journey



While the Beyond CEPA Journey is different for everyone, most credential holders find themselves walking on one of three paths: Path 1, Path 2, or Path 3. To assist you with determining which path is for you, the Exit Planning Institute has developed the Beyond CEPA Path which you can see visually on the left.

This path is broken into three phases: Foundation & Implementation, Integration, and Expertise & Growth. As you move through your roadmap these phases will be described in detail. The goal of the phases is to provide you with applicable guidance, milestones, and critical decision points to ultimately ensure that you develop your unique role within the exit planning community and expand your influence.

Foundation and Implementation

CORE DECISION:

WHAT ROLE DO I WANT TO PLAY?

The central decision during phase one for new CEPAs is to select your development path at the end of the first 120 days. Will you take Path 1, Path 2, or Path 3? This choice will shape your role in the exit planning process and influence your Beyond CEPA path towards professional growth and integration into the CEPA community.

CORE FOCUS:

LAY THE FOUNDATION

This phase and the 120-Day Playbook emphasize foundation and implementation by guiding CEPAs, like yourself, through essential actions over four months. Each month builds on the last, leading you toward mastery of Value Acceleration Methodology™ (VAM) language, collaborative networking, and strategic development. It aims to establish new CEPAs as effective advisors who can communicate and implement exit planning concepts with business owners.

MAJOR DELIVERABLES:

- ♥ Answer the Core Decision
- ♥ Attend Beyond CEPA Call and Critical Milestone Meetings
- ♥ Understand Your Role as an Exit Planner
- ♥ Register for the Exit Planning Summit
- ♥ Complete Your CEPA Development Scorecard
- ♥ Academy Courses
- ♥ Review Whitepapers
- ♥ Meet With Your EPI Account Manager
- ♥ Familiarize Yourself with Your Member Center
- ♥ Partner Network
- ♥ Free CEPA Content
- ♥ Marketing and Integration Resources

CEPA Path Types: Is This You

There is one core decision for phase one of your Beyond CEPA path – which path you will follow. Choosing your path – whether it is Path 1, Path 2, or Path 3 – is critical as it shapes how you will apply Value Acceleration Methodology into your practice and define your role in the exit planning process.

THE IMPORTANCE OF CHOOSING A PATH:

Tailored Skill Development:

Each path aligns with specific skills, allowing CEPAs to focus their growth on the competencies most relevant to their role.

Role Clarity and Brand Positioning:

Selecting a path defines a CEPA's role and value proposition, enhancing their credibility and market differentiation.

Effective Use of Resources and Networking:

Knowing their path enables CEPAs to strategically use EPI resources and build connections that support their specific role.

Guided Professional Growth and Advancement:

The chosen path shapes the CEPA's professional development focus, ensuring purposeful growth and alignment with best practices.

PATH 1:

Focuses on deeper, holistic conversations with business owners and connects with like-minded advisors to drive new opportunities.

PATH 2:

Manages and coordinates the Value Acceleration Methodology or one of its key paths within the Prepare Gate.

PATH 3:

Leads the business improvements path, creating action plans and guiding the owner through exit options and value acceleration efforts.

Identifying Which Path is For You

After completing the 120-Day Playbook and reviewing the definitions of the CEPA Paths, how do you determine which path is right for you?

You can determine which CEPA Path aligns with you through assessing your strengths, careers goals, and the extent to which you want to engage in exit planning beyond your core expertise. We recommend the following steps:

1. Assessing Current Expertise and Interests

You should evaluate your existing skills and professional focus. Those who want to add exit planning concepts and Value Acceleration Methodology to their existing role without diving deeply into the methodology may fit Path 1.

2. Evaluating Client Engagement Goals

If you seek to act as a project manager or advisor guiding business owners through structured 90-day sprints and coordinating multidisciplinary teams, you may find Path 2 path more suitable. This role is ideal for those who want to actively manage client projects and deepen their VAM knowledge without fully transitioning to a consulting role.

3. Interest in Direct Business Improvement and Consulting

Those interested in providing hands-on business improvement, such as growth consulting or value-building, may resonate with Path 3. This path involves applying VAM extensively, managing exit strategy deliverables, and working as the primary advisor for business improvement and transition readiness.

4. Consider Long-Term Professional Goals

You should reflect on where you want to grow within the exit planning industry, as each path leads to distinct career trajectories. Those aiming to be comprehensive advisors or growth consultants to business owners may be drawn to Path 3, while those who prefer to supplement their existing services may be better suited to Path 1 or Path 2.

PHASE ONE

CEPA Development Scorecard

Track your progress and growth by completing the CEPA Development Scorecard at each of the three phases, ensuring a comprehensive approach to mastering exit planning strategies.

TO VIEW ALL SCORECARD ITEMS AT ONCE, SEE PAGE 19.

Exit Planning Summit	Empowering Conversations With Business Owners	Team Building Quiz
120-Day Playbook	Think Tanks	CEPA Launched on LinkedIn
Exit Planning Software Tool	Health Report Tool	CEPA Launched on Website
Credentialed Plus	Business Valuation Through the Value Acceleration Methodology™	120-Day Playbook Course
VAM Language Tutorial	Making Referrals Predictable	Beyond CEPA Net Steps Call
Team Building: Defining Well Functioning Teams		

COLOR KEY

Tools	Academy Courses	Positioning CEPA	Advancement
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Integration

CORE DECISION:

HIRE IT, PARTNER IT, LEARN IT

In the Integration Phase, you are encouraged to decide on the best way to enhance your capabilities and deliver value to clients by assessing whether to hire, partner, or learn additional skills. This decision reflects a strategic approach to addressing any skill gaps or service needs: hiring new team members for in-house expertise, partnering with specialized professionals to expand service offerings, or learning new competencies directly through ongoing education. A tailored combination of these options allows you to align your capabilities with your selected role, ensuring you can meet clients' needs effectively and efficiently.

CORE FOCUS:

BUILDING OUT YOUR ROLE

The Integration Phase is fundamentally about building out your role by establishing a strong, distinct identity as an exit planning advisor, ready to serve business owners with precision and clarity. This focus requires you to define and implement the strategies, resources, and team structures that support your unique role—whether as a connector, project leader, or full-service advisor. Building out this role involves refining how you interact with clients, establishing a trusted team, and creating a clear, cohesive approach to exit planning that consistently adds value.

MAJOR DELIVERABLES:

- ♥ Make the Core Decision
- ♥ Position and Brand Yourself as a CEPA
- ♥ Build Out Your Practice
- ♥ Network and Create Strong Teams
- ♥ Continuous Education through EPI Academy, the Member Center and more

Building Out **Your Role**

As mentioned on the previous page, Phase Two's goal is to help you grow towards a best-in-class advisor by answering the core decision and assisting you with focusing on three key areas:



TARGETED KNOWLEDGE ACQUISITION

You must define the specific expertise required for your chosen role, whether that's acting as a connector, project manager, or hands-on business advisor. By identifying these knowledge areas, you can pinpoint the skills and insights that will make you most effective in client engagements. Leveraging EPI's extensive resources—such as the EPI Academy, the CEPA Accelerator Program, webinars, CEPA Think Tanks, and Member Center content—enables you to address knowledge gaps and deepen your understanding of the Value Acceleration Methodology.



Building Out **Your Role**

BUILDING STRATEGIC PARTNERSHIPS AND TEAMS

CEPAs benefit from identifying and collaborating with essential partners and team members, including financial advisors, attorneys, and other specialists, who support them in fulfilling client needs. Building these relationships creates a strong, multi-disciplinary team capable of delivering comprehensive, value-driven services in exit planning. Through EPI's community offerings—networking events, chapters, and the annual summit—you can cultivate meaningful connections and assemble a collaborative team that enhances your service scope and impact.



MARKETING AND BRAND DEVELOPMENT

A clear, strategic brand is essential to position you as a trusted advisor in exit planning and as an expert in VAM. Developing a strong brand identity involves establishing credibility, communicating the CEPA credential effectively, and engaging clients through thought leadership content. Using Member Center resources, EPI chapters, and social media tools, you can share insights and build a reputation that elevates your visibility, authority, and reach in the exit planning field.



PHASE TWO

CEPA Development Scorecard

Track your progress and growth by completing the CEPA Development Scorecard at each of the three phases, ensuring a comprehensive approach to mastering exit planning strategies.

TO VIEW ALL SCORECARD ITEMS AT ONCE, SEE PAGE 19.

Project Management Tool	Selling to Business Owners	Conducting Effective Client Workshops
Mastering the Triggering Event Academy Course	Pricing Strategies Tutorial	Effective Branding Workshop
CEPA Accelerator		

COLOR KEY

Tools	Academy Courses	Positioning CEPA	Advancement
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Expertise and Growth

CORE DECISION:

DEVELOP A SPECIALIZED APPROACH AS A CEPA

In this final phase of your Beyond CEPA Path, the core decision for you is to establish a specialized approach that aligns with your strengths and differentiates your services within the exit planning field. Whether focusing on business growth consulting, value building, or comprehensive client advisory services, this decision allows you to carve out a distinct niche that highlights your unique expertise and approach to VAM. By identifying and cultivating your specialty, you can position yourself as a go-to expert for specific client needs, making a lasting impact in the exit planning community and the marketplace.

CORE FOCUS:

KNOWLEDGE, BRAND, & COMMUNITY

The Expertise and Growth Phase centers on elevating your knowledge, strengthening your brand presence, and enhancing your influence within the EPI community. This phase encourages you to continue learning through targeted educational resources, refine your public-facing brand to emphasize their specialized role, and actively engage in the EPI network to expand your reputation as a thought leader. As you increase your involvement in the community, you build meaningful relationships, gain peer recognition, and reinforce your standing as an expert in exit planning.

MAJOR DELIVERABLES:

- ♥ Make the Core Decision
- ♥ Refine Your Exit Planning Niche
- ♥ Become a Thought Leader in VAM
- ♥ Continuing Education and Specialization
- ♥ Integrate Tools and Software to Streamline Services

Staying Certified: Your Guide to the 3-Year CE Requirement

Your CEPA credential must be renewed every three years via continuing education. To maintain your earned credential, you must complete:

■ ONGOING ADHERENCE TO PROFESSIONAL CONDUCT REQUIREMENTS

Continual professional development activities or a combination of professional development activities and contributions to the profession.

■ MEET MINIMUM CONTINUING EDUCATION REQUIREMENTS

You must complete a minimum of 40 hours of exit planning-related professional development. EPI accepts reciprocal CE hours from CPE, CFP, etc. EPI, however, does not accept ethics as CE.

Important Note: 20 hours must be Value Acceleration Methodology-based education called EPI-Hours. These come from EPI or its endorsed partners and are Value Acceleration Methodology-based. Examples of qualifying activities offered by the Exit Planning Institute, such as the Exit Planning Summit, EPI Academy Courses, Chapter Events, CEPA Think Tanks, Webinars, and more.

■ MAINTAIN PROFESSIONAL/ETHICS

STANDARDS: As a renewing certification holder, you must agree in writing that you will adhere to the EPI Professional Standards and Code of Ethics, and you must re-attest that you have not been convicted of a felony related to the practice of exit planning.

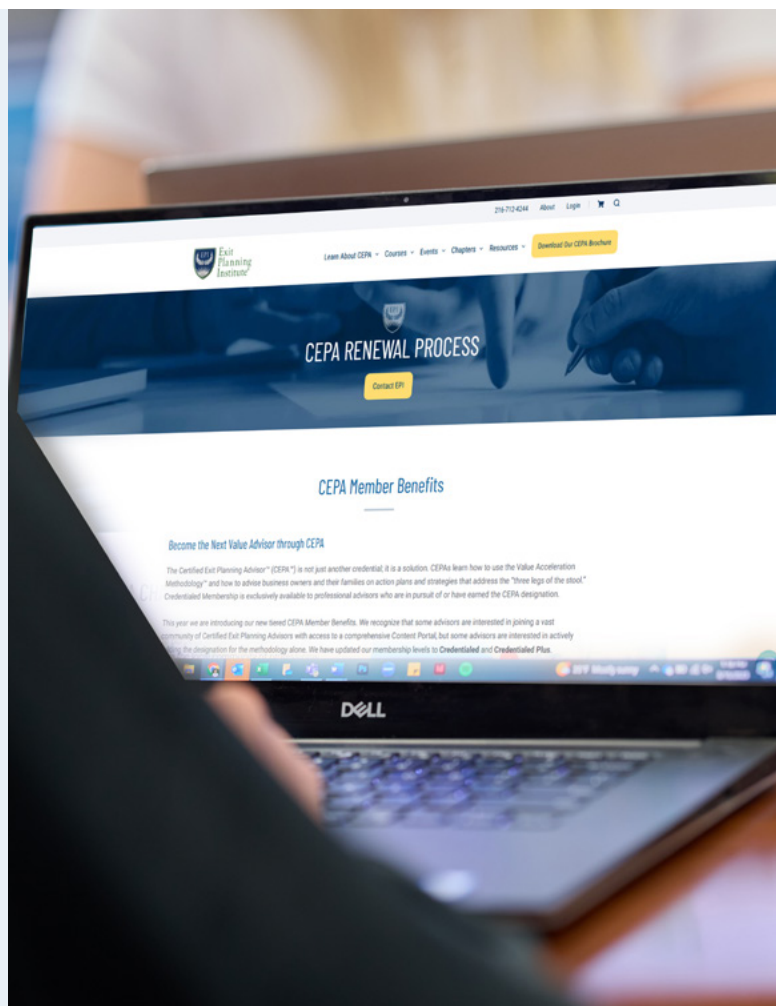


SCAN THE QR CODE OR VISIT THE
URL BELOW TO LEARN MORE:
qr.exitinfo.org/ce-tracker

Your Guide to the 3-Year CE Requirement **Continued**

In addition to the requirements stated on the previous page, to maintain the CEPA credential, an Annual Membership fee must be maintained. In the case the Annual Membership fee is not maintained, your CEPA credential will be de-activated and your membership terminated. An applicant will be ineligible for renewal if their Annual Membership fee is past due.

FOR MORE INFORMATION VISIT
qr.exitinfo.org/cepa-renewal-process



PHASE THREE

CEPA Development Scorecard

Track your progress and growth by completing the CEPA Development Scorecard at each of the three phases, ensuring a comprehensive approach to mastering exit planning strategies.

TO VIEW ALL SCORECARD ITEMS AT ONCE, SEE PAGE 19.

VAM Management Tool	Attend the Triggering Event Workshop at the Summit	Tap Into Your Quiet Confidence and Unlock Engagement Potential
CVGA Credential or Equivalent	The 21-Step Guide to Succession and Exit Planning	Accelerate Your Exit Planning Practice
Practice Launch Lite		

COLOR KEY

Tools	Academy Courses	Positioning CEPA	Advancement
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Review and Track Your Progress Across All Phases

The CEPA Development Scorecard is your comprehensive tool for mastering exit planning strategies. Use the scorecard on page 19 to review all three phases of your development journey at once, ensuring that you've completed every essential item in each phase.

By tracking your progress and growth across these phases, you can confidently build your expertise and stay on course toward achieving your professional goals. Completing the scorecard at each stage provides a clear roadmap for continuous improvement, helping you fully leverage the benefits of the CEPA credential.



TO DOWNLOAD A SEPARATE PRINTOUT
OF THIS SCORECARD, VISIT THE MEMBER
CENTER RESOURCES SECTION IN YOUR
MEMBER CENTER VIA:

exit-planning-institute.org/knowledge

PHASE ONE	Exit Planning Summit	Empowering Conversations With Business Owners	Team Building Quiz
	120-Day Playbook	Think Tanks	CEPA Launched on LinkedIn
	Exit Planning Software Tool	Health Report Tool	CEPA Launched on Website
	Credentialed Plus	Business Valuation Through the Value Acceleration Methodology™	120-Day Playbook Course
	VAM Language Tutorial	Making Referrals Predictable	Beyond CEPA Next Steps Call
	Team Building: Defining Well Functioning Teams		
PHASE TWO	Project Management Tool	Selling to Business Owners	Conducting Effective Client Workshops
	Attend Mastering the Triggering Event Academy Course	Pricing Strategies Tutorial	Effective Branding Workshop
	CEPA Accelerator		
PHASE THREE	VAM Management Tool	Attend Mastering the Triggering Event Workshop at the Summit	Tap Into Your Quiet Confidence and Unlock Engagement Potential
	CVGA Credential or Equivalent	The 21-Step Guide to Succession and Exit Planning	Accelerate Your Exit Planning Practice
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COLOR KEY

Tools	Academy Courses	Positioning CEPA	Advancement
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Educational Opportunities to Support Your Beyond CEPA Path

The Beyond CEPA Path is designed to guide your ongoing professional growth, and EPI offers a range of educational resources to support you every step of the way.

From specialized courses within EPI Academy to collaborative CEPA Think Tanks, the Exit Planning Summit and cutting-edge industry publications, these tools are tailored to help you deepen your expertise and expand your impact as an advisor. Wherever you are on your Beyond CEPA journey, EPI's resources ensure you have the knowledge and connections to continue growing and delivering value.

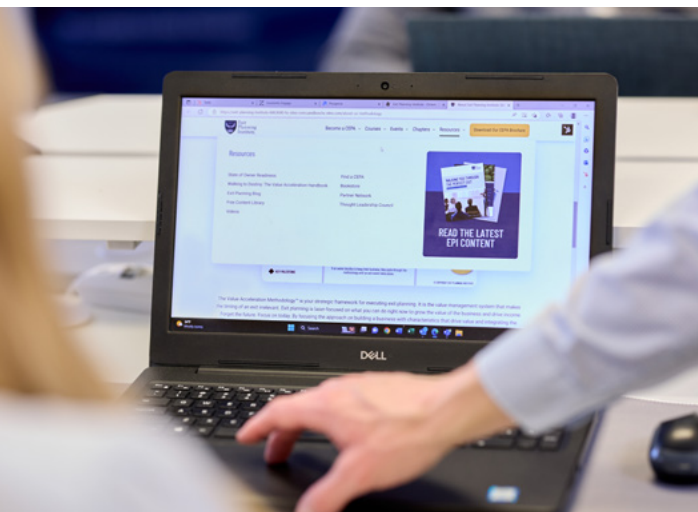


EPI ACADEMY is your go-to platform for advancing your knowledge and skills as you progress along the Beyond CEPA Path. With on-demand courses designed by industry experts, it offers practical education to help you expand your expertise and deliver greater value to your clients. Accessible anytime, EPI Academy ensures you can continue learning and earning CE credits at your own pace, wherever your journey takes you.



EPI's **CHAPTER NETWORK** connects you with a nationwide community of professionals to support your journey along the Beyond CEPA Path. With local events, workshops, and networking opportunities, chapters provide the education and collaboration you need to grow your expertise and impact. Joining a chapter keeps you informed on industry trends while building relationships that strengthen your practice and advance your career.

The **EXIT PLANNING SUMMIT** is your opportunity to connect with industry leaders and elevate your expertise as you progress on the Beyond CEPA Path. Over three days, you'll gain cutting-edge strategies through keynotes, breakout sessions, and networking with top professionals in the field. This event is designed to inspire, educate, and empower you to deliver greater value in your practice and to your clients.

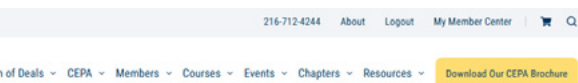


Expand your expertise with **EPI WEBINARS** and **CEPA THINK TANKS**. Attend webinars led by industry experts on topics like becoming a holistic advisor, implementing exit planning, and educating business owners. Join bi-weekly CEPA Think Tanks to network, explore new topics, and earn 1 hour of CEPA Continuing Education Credit per session—exclusively for members.

Leverage EPI's Support to Maximize Your Growth

Your journey beyond the CEPA designation is one that offers exciting opportunities, but it's not a path that should be walked alone.

At the Exit Planning Institute (EPI), we understand that continued growth and success require ongoing support, resources, and collaboration. Whether you're looking to refine your skills, expand your network, or take your business to the next level, EPI provides the tools and community to help you every step of the way.



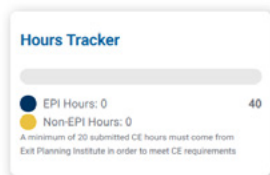
Welcome to your EPI Member Center

Your EPI Member Center includes access to exclusive, members-only content and resources, EPI Academy courses, and tracks your continuing education credits.

My CE Credits

View your approved CEPA CE hours with the CE Hours Tracker.

[Upload Credits Here](#)



MEMBER CENTER: Your Hub for Growth

As a CEPA, the EPI Member Center is your gateway to an array of educational tools designed to propel your professional development. Access the CEPA Development Scorecard to chart your journey forward while tracking milestones and achievements as you continue to grow. With curated resources, including archived webinars, exclusive tools and shareable content, the Member Center ensures that you're always learning and evolving. By regularly checking off milestones on your scorecard, you can see your progress along your Beyond CEPA Path, all while staying aligned with the evolving demands of exit planning.



SUPPORT TEAM: Personalized Guidance at Your Fingertips

Beyond the designation, the EPI Support Team is here to help you succeed at every stage. Whether you need help navigating a new challenge or advice on how to take the next step in your career, your dedicated Account Manager and support staff are just a call or email away. They offer personalized, one-on-one guidance tailored to your specific needs, ensuring that you always have the expert assistance you need to maximize your growth. With EPI's support, you'll never feel like you're tackling the next phase alone.



COMING WINTER 2025 COMMUNITY FORUM: Networking and Collaboration with Fellow CEPAs

EPI's Community Forum offers an exclusive platform where CEPAs can connect, collaborate, and share ideas. This professional space allows you to engage with a diverse network of exit planning professionals, fostering valuable relationships and knowledge exchange. Whether you're seeking advice, brainstorming new strategies, or simply looking to expand your professional network, the forum provides a dynamic environment for growth. The collective wisdom of the CEPA community is a powerful resource, and through these connections, you'll find new opportunities for learning, partnerships, and business development.

Celebrate Your Achievement

CEPA Plaque

Display your achievement with the Certified Exit Planning Advisor (CEPA®) Plaque. Featuring a sleek black finish and a solid brass engraving, this elegant 9" x 12" plaque highlights your CEPA designation with professionalism and sophistication. Perfect for your office or home, it proudly represents your commitment to excellence as an exit planning advisor.



SCAN THE QR CODE OR VISIT THE URL
BELOW TO ORDER YOUR CEPA PLAQUE:
qr.exitinfo.org/cepa-plaque



Your Journey to Best-In-Class Starts Here

As you reach the conclusion of this Beyond CEPA Roadmap, remember that this path is just the beginning of your ongoing journey in the world of exit planning.

Designed to help you deepen your expertise, expand your network, and amplify your impact, the roadmap provides you with a clear, actionable framework to navigate the stages of Foundation & Implementation, Integration, and Expertise & Growth. Each phase is a milestone in your professional development, guiding you through critical decision points and helping you build the skills and connections necessary to thrive.

But this roadmap is more than just a professional development tool. It's your gateway to the broader EPI community, connecting you to exclusive resources like the EPI Academy, the Exit Planning Summit, and a wealth of networking and educational opportunities. From the tangible benefits of swag items and membership perks to the deeper connections you'll forge, you'll feel fully integrated and supported every step of the way.

The Beyond CEPA path is a dynamic journey—one that empowers you to approach your growth with purpose and confidence. With the resources, community, and guidance that EPI provides, you're poised for long-term success and a meaningful, lasting impact in the exit planning field. Your journey doesn't stop here. It's only just begun.

Questions About Your **Beyond CEPA Path?**

Reach out to your dedicated Account Manager or memberexperience@beyondCEPA.com.



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