



Exit
Planning
Institute®



EXIT PLANNING INSTITUTE® GLOBAL PROGRAMS

Credentials, courses, and conferences that arm business advisors with the exit planning education and tools needed to build value in an owner's business, strengthen relationships, and become their most valued advisor.

Founded in

2005

The Exit Planning Institute has educated professional advisors for almost 20 years.



NETWORK OF EXIT
PLANNING PROFESSIONALS
FROM OVER **18 COUNTRIES**



8,000+

Certified Exit Planning Advisors

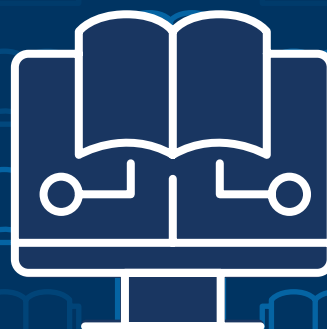


Formed over

30 CHAPTERS

Hosted the **LARGEST
EXIT PLANNING-CENTRIC
CONFERENCE** in the *world*
with **750+ guests**.

20+ COURSES AVAILABLE



TOP FIVE

COMPANIES
AFFILIATED
WITH **CEPAs**

Edward Jones®



MERRILL
A BANK OF AMERICA COMPANY

Morgan Stanley

RAYMOND JAMES

Visit Exit-Planning-Institute.org or call 216.712.4244 for more information and resources.

INNOVATIVE EDUCATIONAL OPPORTUNITIES TO FIT YOUR INDIVIDUAL PRACTICE NEEDS

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EXIT PLANNING CONTENT

Exit Planning Institute provides advisors and business owners with free educational content and resources to improve their knowledge on various exit planning topics to utilize with their business owner clients.



Webinars

Exit Planning Institute offers in-depth webinars with industry experts on a wide assortment of topics. Our current webinar series' help professionals Become a Holistic Advisor, Implement Exit Planning, and Educate Business Owners.

LEARN MORE ABOUT OUR UPCOMING WEBINARS AT

EPIWebinars.com



Blog

Exit Planning Institute shares weekly blogs for professional advisors and middle market business owners to keep up-to-date with exit planning, succession planning, advisory team roles, industry trends, unique specialty insights, and useful content.

READ OUR LATEST ARTICLES AT

ExitPlanningBlog.com



**5-4-3-2-1:
Five Things Every Business
Owner Must Know About
Exit Planning**



CEPA® Think Tanks

Join our bi-weekly virtual best practices and networking groups, hosted by the EPI Member Experience team. Think Tanks introduce CEPAs to new topics, integrating best practices through deep conversations with global peers. Each session earns 1 hour of CEPA Continued Education Credit, a member-exclusive benefit.

LEARN MORE ABOUT UPCOMING CEPA THINK TANKS

CEPAThinkTanks.com

Deep Dive Content

Exit Planning Institute shares new content quarterly on trending exit planning topics. This gives advisors and owners a deep dive into the value acceleration methodology. Through whitepapers, case studies, and infographics, advance your education and stay up to date with industry trends.

EXPLORE OUR CONTENT AT

EPIContentLibrary.com

The process of growing a significant company takes time and can be complex. This whitepaper from Exit Planning Institute takes the Value Acceleration Methodology and breaks it into 5 easy concepts as we introduced as 5-4-3-2-1. Though easy to understand as a business owner you may be sitting here still wondering “how do I implement this?”

DOWNLOAD THE WHITEPAPER AT

EPIContentLibrary.com

THE CERTIFIED EXIT PLANNING ADVISOR CREDENTIALING PROGRAM

The Certified Exit Planning Advisor (CEPA) Program is the only program of its kind. This program offers professional advisors an innovative learning experience, performance-enhancing resources, and strategic tools to help them advance their exit planning practice.

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.



SEE ALL AVAILABLE PROGRAM DATES AT:

[GETCEPA.COM](https://getcepa.com)





"You have definitely validated my selection of EPI over BEI for my professional credential and have done a great job of promoting EPI and the CEPA credential. You definitely are practicing what you preach."

CONSULTANT, CEPA SINCE 2013



"CEPA didn't just provide me a credential and a technical process. It changed the way I looked at all aspects of my practice. Every advisor should attend this course."

CPA, CEPA SINCE 2016

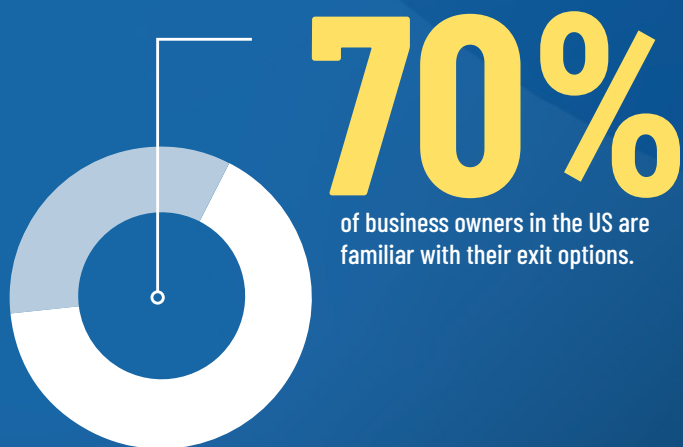


"The CEPA credential is one of the most valuable and useful designations I have in working with business owners. It gave me a knowledge base, vocabulary, and a process to speak with any Business Owners with confidence. If you want to work with business owners, the CEPA designation is essential."

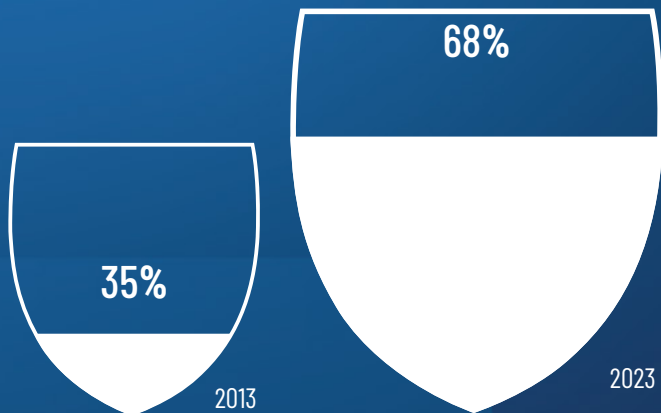
WEALTH MANAGER, CEPA SINCE 2019



After over 10 years of **Regional State of Owner Readiness** research, this National data shows the impact of a strong transition strategy.

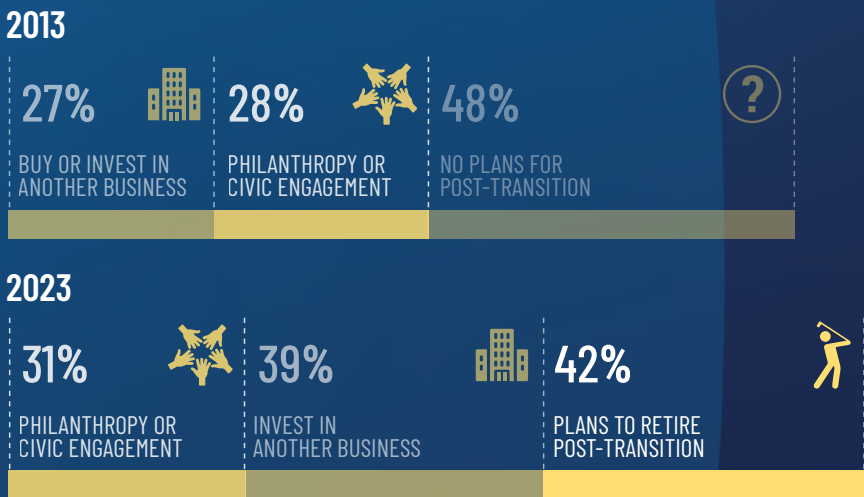


Percent of owners with formal education planning



Business Owners' Post-Transition Plans

The 2023 business owner respondents were asked, "what do you plan to do post-transition?" Though the passion for entrepreneurship is dominant for the 2023 business owner respondents, retirement was the number one answer for what this group will do post-transition.



2023 NATIONAL STATE OF OWNER READINESS REPORT



How do today's owners stack up against a decade ago? Delve into the latest insights, assessing business attractiveness and owner readiness on a national scale.

Explore how readiness, paired with business attractiveness, significantly amplifies transition success. Uncover crucial findings indicating that prepared owners not only achieve **SUCCESSFUL** exits but **SIGNIFICANT** ones.

**HOW READY ARE
BUSINESS OWNERS?
FIND OUT NOW!**

OwnerReadiness.com



EXIT PLANNING SUMMIT

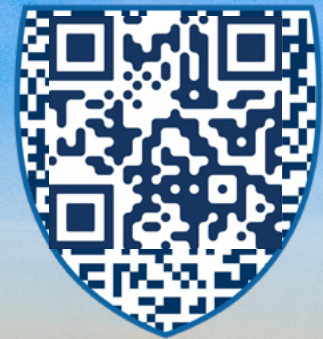


Sunday, April 19 - Tuesday, April 21

Nashville, Tennessee

Gaylord Opryland Resort & Convention Center

The Exit Planning Summit is the coming together of the **exit planning community**. The best advisors from around the world collaborate with their supporting partners and colleagues that are all helping business owners to create more significant companies. Advisors will leave the Exit Planning Summit not only galvanized to accelerate their practice but with the tools and connections to do so.



REGISTRATION IS NOW OPEN VISIT [EXITPLANNINGSUMMIT.COM](https://exitplanningsummit.com) OR SCAN QR CODE



"The content was compelling, the speakers energizing, the networking meaningful and the location was delightful. I walked away with a list of action items to implement in our market to help our Advisors become even more proficient in this space."

WEALTH MANAGER, UBS FINANCIAL SERVICES, INC.



"I can't begin to say how much I enjoyed the Summit. The caliber of speakers was just tremendous. Honestly, I think it is the best conference I've ever been to."

FINANCIAL ADVISOR, CHARLES SCHWAB & CO, INC.



EPI CHAPTER NETWORK



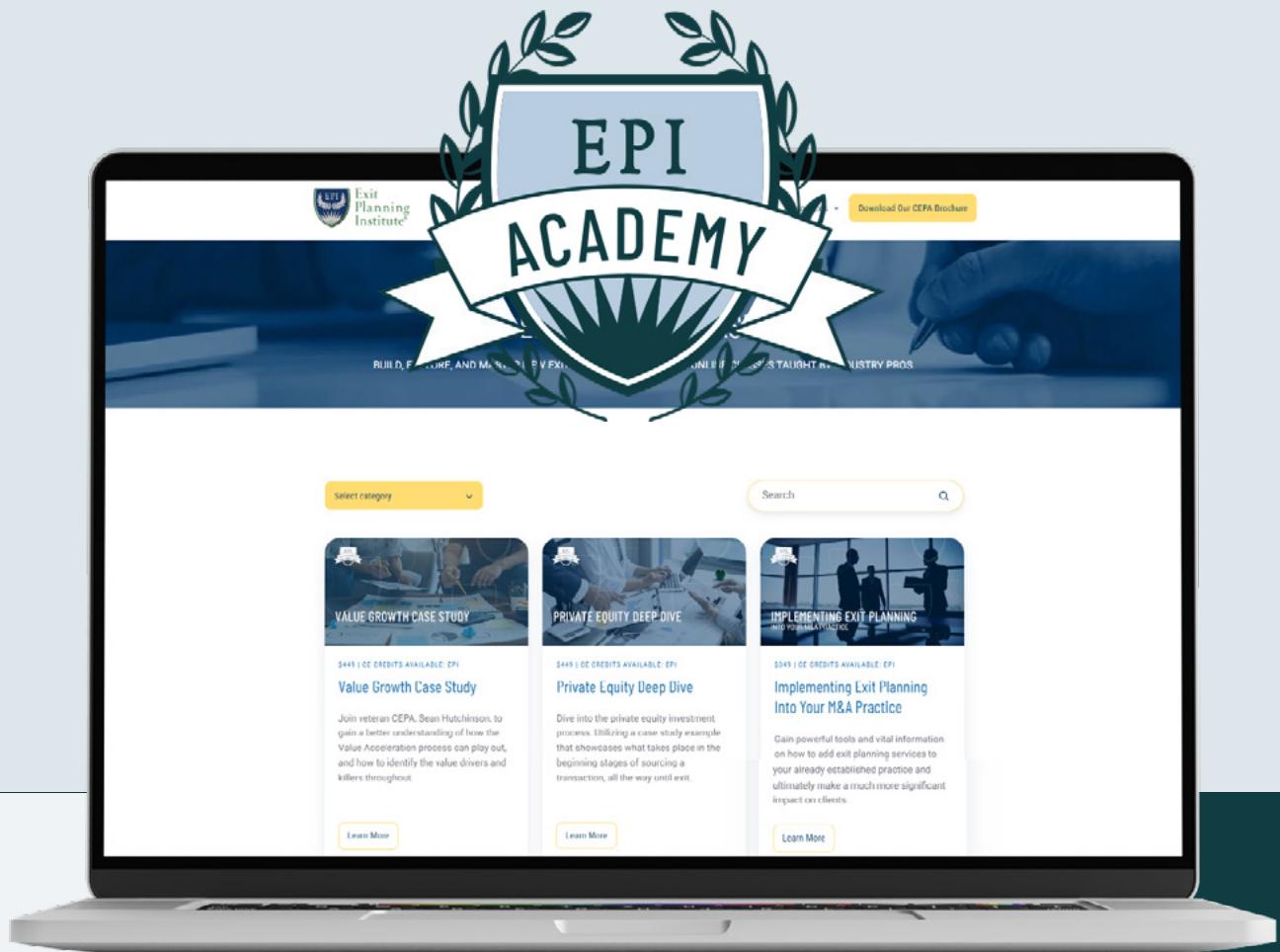
The EPI Chapter Network has over 30 chapters across the United States.

These chapters host monthly educational networking events for advisors and business owners and create a forum to collaborate and address their community's unique needs. The EPI Chapter Network creates, encourages, and fosters the adoption of best practices for the exit planning profession and promotes the common business interests of those business advisors engaged in the profession.

EXPLORE AND FIND YOUR
EPI CHAPTER AT:

EPIChapters.com





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.

1. UNDERSTANDING EXIT PLANNING
2. BUSINESS VALUATION
3. PRACTICE MANAGEMENT
4. BUSINESS DEVELOPMENT
5. EXIT STRATEGY

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

SCOTT SNIDER
PRESIDENT, EXIT PLANNING INSTITUTE

**LEARN MORE ABOUT OUR
EPI ACADEMY COURSES AT:**

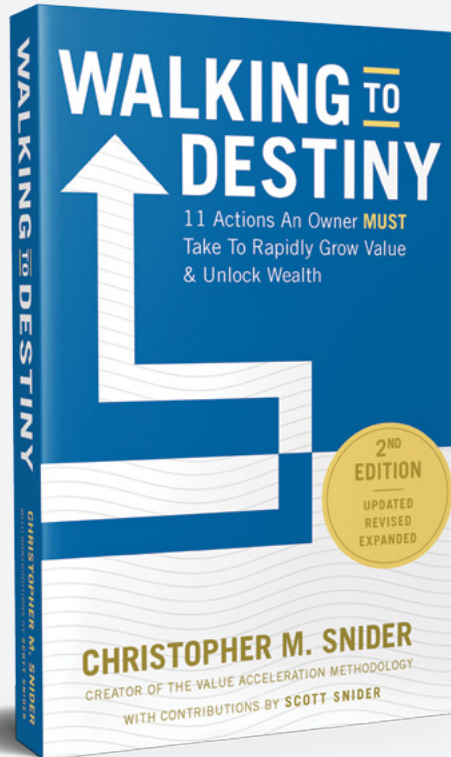
EPIAcademyCourses.com



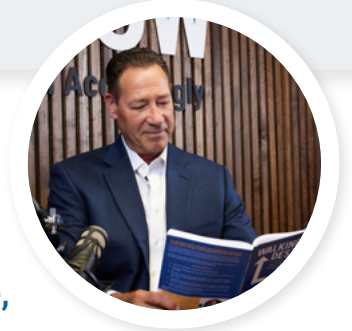
WALKING ^{TO} DESTINY

11 Actions An Owner **MUST**
Take To Rapidly Grow Value
& Unlock Wealth

CHRISTOPHER M. SNIDER, CEPA



Walking to Destiny will position you to build and preserve family wealth for generations.



Veteran entrepreneur and CEO of the Exit Planning Institute, Christopher Snider, brought forty years of experience in corporate finance and leadership to his five-star rated 2016 edition of *Walking to Destiny*. In this revised, updated, and expanded edition, he brings even more depth to his paradigm-changing work.

ORDER YOUR COPY AT:

WalkingtoDestiny.com



TOPICS COVERED INCLUDE:



Exit Planning



Valuation



Finance



Business
Development



PLAN ACCORDINGLY with Scott Snider



Join Scott Snider, President of the Exit Planning Institute® and lifelong entrepreneur, as he welcomes business owners and their expert advisors to discuss how they build significant value in their businesses through Value Acceleration.

Exit Is Now will explore how to grow value in your business and personal life by aligning your personal, business, and financial goals.



LEARN MORE AT ExitIsNow.com

HISTORY OF EXIT PLANNING INSTITUTE®

The Exit Planning Institute® (EPI) Forms

Peter Christman and Richard Jackim, launch EPI to provide the exit planning tools and resources advisors needed.

2005

The First Exit Planning Summit Takes Place

The inaugural Exit Planning Summit takes place in Fort Lauderdale to bring together CEPAs and professional advisors.

EPI Found the Chapter Network

Christopher Snider launches the first EPI Chapter in Northeast Ohio to spread exit planning awareness and best practices. Today, the EPI Chapter Network is comprised of local advisors dedicated to changing the outcome for owners.

2011

The Value Acceleration Methodology™ Reframes "Exit Planning"

The Value Acceleration Methodology becomes the framework for exit planning—beginning a legacy of building ongoing, transferable business value.

2013

The First National State of Owner Readiness™ Releases

EPI conducts the first research report on business attractiveness and owner readiness to better serve and understand the transitioning owner market, measuring local, regional, and national data.



2007

The CEPA® Credentialing Program Launches

The Certified Exit Planning Advisor (CEPA®) Credentialing program launches at the University of Chicago with a goal of exposing advisors to the diverse disciplines that contribute to an effective exit plan and the necessary execution tools.



2012

Snider Premier Growth Acquires EPI

As a CEPA himself, Christopher Snider recognizes the value of EPI and acquires the group under Snider Premier Growth with son Scott Snider.



2016

Walking To Destiny: 11 Actions an Owner Must Take to Rapidly Grow Value & Unlock Wealth Publishes

Christopher Snider publishes Walking to Destiny, the official exit planning handbook, to equip owners and advisors with the knowledge to recognize value potential, execute growth tactics, and harvest wealth locked inside their business.

SUCCESSFUL TO SIGNIFICANT

EPI Goes Virtual: First CEPA Online

After solely providing in-person education, EPI pivots the CEPA® credentialing program to a state-of-the-art virtual offering, completely transforming the platform for advisors.

2020

EPI Academy Launches

EPI Academy, an interactive and award-winning online learning platform, launches from growing demand for exit planning education.

2022

Exit Planning Spotlights at the United States Senate

The U.S. Senate Committee on Small Business and Entrepreneurship highlights key exit planning concepts in their "Succession Planning: Opportunities to Build Wealth and Keep Jobs in the U.S." special session with EPI as an expert witness.

2024

Improved State of Owner Readiness

Ten years after the first study, EPI conducted the second National State of Owner Readiness and observed a significant improvement in owner readiness and exit planning awareness.

2025

2021

EPI Strategically Expands with New President

EPI signifies focused strategic growth, naming Scott Snider as new president of the business.

Second Edition of *Walking to Destiny* Releases

Christopher Snider releases the revised second edition of *Walking to Destiny* with insights about the Value Acceleration Methodology™ and exit planning industry developments.

Exit Is Now Podcast Premieres

Business owners and expert advisors take to the podcast studio to discuss building significant business value through the Value Acceleration Methodology™.

New Headquarters Opens

The Exit Planning Institute team moves to a larger headquarters in Cleveland, Ohio, to accommodate the rapid, strategic growth of the company.

EPI Introduces DriveValue.com™

The Exit Planning Institute launches its business owner-focused platform to allow owners to shift to significance and stay ahead of the curve in exit planning.





**WHERE INNOVATION
MEETS LEGACY**

How do you build legacy as a business owner, a business leader, or a next-generation owner?

Well, it starts with aligning your business, financial, and personal goals to create significant value with your company. It's not just about being successful. It's about having the right mindset and the right people helping you drive value. What is the right mindset? Growth. As the owner, you want to create value for your company, sure, but you also want to maintain that value creation so your company can be at its best when it comes time to exit. And having the right people in your pit crew makes that journey smoother, achievable, and exciting.

Learn how to grow your business holistically through the Value Acceleration Methodology™, and how a Certified Exit Planning Advisor (CEPA®) is the right choice as you make your way to the finish line. At [DriveValue.com](https://drivevalue.com)™, we can help you get there with educational courses, resources, and exciting at-track opportunities so you can put the pedal to the metal on building your legacy.

With [DriveValue.com](https://drivevalue.com), you will have ample resources in hand, in both online and in-person formats, to learn more about accelerating value as well as connect you to the CEPA who will guide you on your journey. [DriveValue.com](https://drivevalue.com) will also serve as the one-stop for your internal team, like your executive team and your family, so the whole pit crew is aligned on your journey to significance.

PUT YOUR FOOT ON THE GAS AT
DRIVEVALUE.COM



FOLLOW US ON  [LINKEDIN.COM/COMPANY/DRIVE-VALUE](https://www.linkedin.com/company/drive-value)



exit-planning-institute.org
216.712.4244
epiglobal@exit-planning-institute.org
linkedin.com/company/exit-planning-institute
@beyondCEPA

For more information about all upcoming Exit Planning Institute events, contact epiglobal@exit-planning-institute.org