



WHAT IS A



CEPA[®]
Certified Exit Planning Advisor

“An exit planning advisor is an advisor to a business owner that is skilled at aligning business, personal, and financial goals to grow company of significance, ensure a successful transition at the point of exit, and more profitable and better company for the owner today.”

– Scott Snider, President, Exit Planning Institute[®]

A Certified Exit Planning Advisor is a professional designation awarded by the Exit Planning Institute[®] (EPI).

The CEPA[®] designation was created to provide a structured and comprehensive framework for exit planning. 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.

WHAT DOES A CEPA DO?



CEPAs play a multifaceted role in the exit planning process, leveraging their unique professional backgrounds to guide business owners through successful transitions. While all CEPAs are trained in the core principles of exit planning, their practice can vary widely depending on their primary profession.

It's important to note that while CEPAs are trained within the Value Acceleration Methodology and can handle various aspects of exit planning, they often focus on the areas aligned with their professional expertise.

For example, a CEPA who is also an attorney might provide critical legal insights from a business or estate planning perspective, while a CEPA financial advisor would focus on optimizing personal financial strategies and investment planning. This flexible and specialized approach allows business owners to benefit from the comprehensive knowledge of exit planning while receiving focused expertise tailored to their specific needs.

CORE RESPONSIBILITIES CAN INCLUDE:



ASSESSING BUSINESS READINESS FOR EXIT:

Evaluating a company's preparedness for a transition and identifying areas that need improvement.



CREATING STRATEGIC EXIT PLANS:

Developing tailored exit strategies that align with the business owner's personal and financial goals.



COORDINATING WITH OTHER PROFESSIONALS:

Working with accountants, lawyers, financial planners, and other experts to ensure a holistic approach to exit planning.



QUARTERBACKING:

Acting as the central coordinator, or "quarterback," of the entire exit planning team, ensuring all aspects of the plan are integrated and executed effectively.



WHY IS THE CEPA DESIGNATION IMPORTANT?

The CEPA designation holds significant value for business owners. Firstly, it ensures that the advisor possesses a high level of expertise and professionalism in exit planning. This builds trust and credibility with clients, as business owners can be confident in the advisor's ability to handle complex exit planning scenarios.

An exit planning certification is important for any advisor to have.

According to Scott, **"It certainly showcases a level of expertise. But to me, it runs deeper. A credential showcases a person's commitment to excellence, to purposeful learning, and evolving the way they think. It is more about the overall investment into the individual's growth within that field."**

The rigorous training and standards upheld by the Exit Planning Institute further underscore the importance

of the CEPA designation. The credentialing process involves a comprehensive curriculum designed to cover all aspects of exit planning, ensuring that CEPAs are well-equipped to handle the unique challenges of each business they serve.

Statistics and success stories often highlight how businesses guided by CEPAs achieve more profitable exits and smoother transitions.