



## CERTIFICATE OF ATTENDANCE

THIS CERTIFICATE IS AWARDED TO  
**Ben Cordiner**

FOR SUCCESSFUL ATTENDANCE AT  
**EPI CEPA ONLINE**  
Certified Exit Planning Advisor (CEPA) Credentialing Program

**NUMBER OF CPE HOURS AWARDED: 10**

**CFP® CE HOURS AWARDED: 0**

DATE: Monday, February 24, 2025 – Friday, February 28, 2025

LOCATION: Virtual Classroom / Online Certification

This course has been awarded up to 13.5 hours of CFP® continuing education by the CFP® Board and up to 18.0 hours of NASBA. In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour

CFP® Continuing Education Provider #5036 Exit Planning Institute  
NASBA Continuing Education Provider #109107 Exit Planning Institute

INSTRUCTION DELIVERY METHOD: GROUP INTERNET-BASED

| Module | CFP®<br>CE<br>Earned | NASBA<br>CE<br>Earned | Event Date | PROGRAM NAME                                                           | CFP®<br>#5036<br>Exit<br>Planning<br>Institute | CFP® Field of<br>Study                   | NASBA<br>#109107<br>Exit<br>Planning<br>Institute | Fields of Study:<br>NASBA | Time for<br>Classroom<br>Offering | Speaker                     |
|--------|----------------------|-----------------------|------------|------------------------------------------------------------------------|------------------------------------------------|------------------------------------------|---------------------------------------------------|---------------------------|-----------------------------------|-----------------------------|
| M1     | 0                    | 0                     | 2/24/2025  | Exit Planning Reinvented                                               | N/A – 0 hrs approved                           | General Principles of Financial Planning | N/A – 0 hrs approved                              | Specialized Knowledge     | :18 minutes                       | Scott Snider                |
| M2     | 0                    | 1                     | 2/24/2025  | The Exit Planning Process and Value Acceleration Methodology™ Overview | YES – 2.5 hrs 310451                           | General Principles of Financial Planning | YES – 2.5 hrs                                     | Finance                   | :74 minutes + 9,500 textbook      | Christopher Snider, CEPA    |
| M3     | 0                    | 0                     | 2/24/2025  | Financial Planning for Business Owners                                 | N/A – 0 hrs approved                           | General Principles of Financial Planning | N/A – 0 hrs approved                              | Finance                   | :43 minutes                       | Jesse Abercrombie           |
| M4     | 0                    | 1                     | 2/24/2025  | Integrated Tax, Estate, and Charitable Planning for Business Owners    | YES - 1 hr 333202                              | Tax Planning                             | YES – 1 hr                                        | Taxes                     | :54 minutes                       | Joseph Strazzeri, CEPA, Esq |

|     |   |     |           |                                       |                         |                                          |               |                                      |             |                                |
|-----|---|-----|-----------|---------------------------------------|-------------------------|------------------------------------------|---------------|--------------------------------------|-------------|--------------------------------|
| M5  | 0 | 1   | 2/24/2025 | Personal Planning for Business Owners | YES - 1 hr<br>333213    | Psychology of Financial Planning         | YES – 1 hr    | Specialized Knowledge                | :50 minutes | Susan Latremaille-Oehser       |
| M6  | 0 | 1   | 2/24/2025 | Introduction to the Triggering Event  | YES - 1 hr<br>333203    | General Principles of Financial Planning | YES – 1 hr    | Business Management and Organization | :60 minutes | Christopher Snider, CEPA       |
| M7  | 0 | 1   | 2/25/2025 | Basics of Business Valuation          | YES – 1.5 hrs<br>333204 | Retirement Savings, Income Planning      | YES – 1.5 hrs | Accounting                           | :93 minutes | Shina Culberson, CFA, CEPA     |
| M8  | 0 | 1.5 | 2/25/2025 | Value Enhancement Process             | N/A – 0 hrs approved    | Practice Management                      | YES – 1 hr    | Business Management and Organization | :60 minutes | Sean Hutchinson, CEPA, CMAA    |
| M9  | 0 | 1   | 2/25/2025 | Goals and Objectives                  | YES - 1 hr<br>310459    | Retirement Savings, Income Planning      | YES – 1 hr    | Specialized Knowledge                | :57 minutes | Christopher Snider, CEPA       |
| M10 | 0 | 0   | 2/26/2025 | Creating Action Plans                 | N/A – 0 hrs approved    | Practice Management                      | YES – 1 hr    | Communications and Marketing         | :62 minutes | Christopher Snider, CEPA       |
| M11 | 0 | 0   | 2/26/2025 | Delivering Action Plans               | N/A – 0 hrs approved    | Practice Management                      | YES – 1 hr    | Communications and Marketing         | :53 minutes | Christopher Snider, CEPA       |
| M12 | 0 | 0   | 2/26/2025 | Exit Options Analysis                 | YES – 1.5 hrs<br>333214 | Retirement Savings and Income Planning   | YES – 1.5 hrs | Finance                              | :90 minutes | Christopher Snider, CEPA       |
| M13 | 0 | 0   | 2/27/2025 | Understand Private Equity             | YES - 1 hr<br>333205    | Investment Planning                      | YES – 1 hr    | Finance                              | :54 minutes | Tom Zucker                     |
| M14 | 0 | 0   | 2/27/2025 | Third-Party Sales and the M&A Process | YES – 1 hr<br>310454    | Investment Planning                      | YES – 1 hr    | Finance                              | :73 minutes | Jaclyn Ring                    |
| M15 | 0 | 0   | 2/27/2025 | Understanding Family Transitions      | YES – 1 hr<br>310455    | Estate Planning                          | YES – 1. hrs  | Business Management and Organization | :61 minutes | Judi Cunningham                |
| M16 | 0 | 1   | 2/28/2025 | ESOPs as an Exit Strategy             | YES – 1 hr<br>326129    | Tax Planning                             | YES – 1 hrs   | Finance                              | :51 minutes | Leslie Lauer, CFP®, ChFC, CEPA |
| M17 | 0 | 1   | 2/28/2025 | Importance of Teams                   | N/A – 0 hrs approved    | Practice Management                      | YES – 1.5 hrs | Business Management and Organization | :77 minutes | Amy Wirtz, JD, CEPA            |

NOTE: A \$25.00 Administrative Fee will be charged if it is necessary to conduct research of this record and for replacement of same record.

SIGNATURE: *Scott Snider*, PRESIDENT EXIT PLANNING INSTITUTE

DATE: February 28, 2025

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