# CERTIFICATE OF ATTENDANCE

THIS CERTIFICATE IS AWARDED TO

**Carrie Rodriguez**

FOR SUCCESSFUL ATTENDANCE AT

**EPI CEPA ONLINE**

Certified Exit Planning Advisor (CEPA) Credentialing Program

**NUMBER OF CPE HOURS AWARDED: 5.5**
**CFP® CE HOURS AWARDED: 0**

DATE: Monday, November 17, 2025 – Friday, November 21, 2025
LOCATION: Virtual Classroom / Online Certification

This course has been awarded up to 14.5 hours of CFP® continuing education by the CFP® Board and up to 18.5 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® CE Earned | NASBA CE Earned | Event Date | PROGRAM NAME | CFP® #5036 Exit Planning Institute | CFP® Field of Study | NASBA #109107 Exit Planning Institute | Fields of Study: NASBA | Time for Classroom Offering | Speaker |
|---|---|---|---|---|---|---|---|---|---|---|
| M1 | **0** | **0** | 11/17/2025 | 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** | **2.5** | 11/17/2025 | 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** | **1** | 11/17/2025 | Financial Planning for Business Owners | YES - 1 hr 310457 | General Principles of Financial Planning | YES – 1 hr | Finance | :60 minutes | Justin Goodbread, CEPA, CFP®, CVGA |
| M4 | **0** | **1** | 11/17/2025 | 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 |

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|---|---|---|---|---|---|---|---|---|---|---|
| M5 | **0** | **1** | 11/17/2025 | Personal Planning for Business Owners | YES - 1 hr 333213 | Psychology of Financial Planning | YES – 1 hr | Specialized Knowledge | :50 minutes | Susan Latremoille-Oehser |
| M6 | **0** | **0** | 11/18/2025 | Introduction to the Triggering Event | YES - 1 hr 333203 | General Principles of Financial Planning | YES – 1 hr | Business Management and Organization | : :60 minutes | Christopher Snider, CEPA |
| M7 | **0** | **0** | 11/18/2025 | Basics of Business Valuation | YES – 1.5 hrs 333204 | Retirement Savings, Income Planning | YES – 1.5 hrs | Accounting | :82 minutes | Seth Webber |
| M8 | **0** | **0** | 11/18/2025 | 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** | **0** | 11/19/2025 | Goals and Objectives | YES - 1 hr 310459 | Retirement Savings, Income Planning | YES – 1 hr | Specialized Knowledge | :57 minutes | Christopher Snider, CEPA |
| M10 | **0** | **0** | 11/19/2025 | Creating Action Plans | N/A – 0 hrs approved | Practice Management | YES – 1 hr | Communications and Marketing | :62 minutes | Christopher Snider, CEPA |
| M11 | **0** | **0** | 11/19/2025 | Delivering Action Plans | N/A – 0 hrs approved | Practice Management | YES – 1 hr | Communications and Marketing | :53 minutes | Christopher Snider, CEPA |
| M12 | **0** | **0** | 11/20/2025 | Exit Options Analysis | YES – 1.5 hrs 333214 | Retirement Savings and Income Planning | YES – 1.5 hr | Finance | :90 minutes | Christopher Snider, CEPA |
| M13 | **0** | **0** | 11/20/2025 | Understand Private Equity | YES - 1 hr 333205 | Investment Planning | YES – 1 hr | Finance | :65 minutes | Bobby Kingsbury |
| M14 | **0** | **0** | 11/20/2025 | Third-Party Sales and the M&A Process | YES – 1 hr 310454 | Investment Planning | YES – 1 hrs | Finance | :54 minutes | Michael Lorence |
| M15 | **0** | **0** | 11/21/2025 | Understanding Family Transitions | YES – 1 hr 310455 | Estate Planning | YES – 1. hrs | Business Management and Organization | :50 minutes | Amy Wirtz, JD, CEPA |
| M16 | **0** | **0** | 11/21/2025 | ESOPs as an Exit Strategy | YES – 1 hr 326129 | Tax Planning | YES – 1 hrs | Finance | :60 minutes | Keith Apton, CEPA |
| M17 | **0** | **0** | 11/21/2025 | Importance of Teams | N/A – 0 hrs approved | Practice Management | YES 1 hr | Business Management and Organization | :60 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: November 21, 2025