

BEST-IN-CLASS

CEPA® PROFILE



At Exit Planning Institute® (EPI), being best-in-class is a deliberate choice. It reflects an advisor's commitment to excellence, mastery of their craft, and dedication to guiding business owners through significant transitions. Best-in-class Certified Exit Planning Advisors set the standard, combining expertise with relationship-building and accountability to create optimal exit experiences for business owners.

THE INTANGIBLE QUALITIES OF A BEST-IN-CLASS CEPA

A best-in-class CEPA stands out through:

1

Trust and Respect:

Inspiring confidence in business owners as a trusted advisor.

2

Reputation for Excellence:

Known for delivering consistent desired exits.

3

Leadership and Guidance:

Leading clients through complex transitions with clarity and assurance.

These qualities are not just about building technical skills—they're about earning respect and creating strong, lasting relationships.

KEY ATTRIBUTES OF A BEST-IN-CLASS CEPA

Mastering the Value Acceleration Methodology™ (VAM) Language

Articulating exit planning concepts in ways business owners understand value.

Connecting People

Building a diverse network of advisors and professionals to meet business owners' multifaceted needs.

Lifelong Learning

Committing to continuous education and evolving with industry best practices. Staying ahead of trends to provide key insights and guidance.

WHAT BUSINESS OWNERS WANT FROM ADVISORS:

Business owners at the Exit Planning Summit highlighted two essential traits in advisors

- **"Know Me"**: Take time to understand their unique business and personal goals.
- **Accountability**: Hold them to their strategies and objectives, guiding them through implementation.

BECOMING A BEST-IN-CLASS CEPA:

Achieving this status starts with the CEPA credential, which provides:

- A foundational benchmark of excellence in exit planning.
- Proven methodologies to help businesses unlock value and prepare for transitions.

What sets the best-in-class apart is their commitment to:

- Leadership through expertise.
- Building trust through connection.
- Delivering results through accountability.

YOUR PATH TO BEST-IN-CLASS

To be best-in-class as a CEPA is to embody excellence, inspire confidence, and set the standard in exit planning. At EPI, we support advisors on this journey, equipping them with tools, education, and a network to achieve not just success, but also significance.

**Are you ready to elevate your career and impact as a CEPA?
Make the commitment today to set the standard—and lead the way.**

EXIT-PLANNING-INSTITUTE.ORG