

WHAT IS EXIT PLANNING?

Exit Planning *noun*

ex·it plan·ning

- 1: Exit planning combines the plan, concept, effort, and process into a clear, simple strategy to build a business that is transferable through strong human, structural, customer, and social capital. The future of the business owner, their family, and the business itself are addressed by exit planning through creating value today.
- 2: Exit planning is not just a plan. It is a strategy rooted in execution that grows value while expanding options so that an owner can transition the business on their terms when they are ready. It aligns the business, personal, and financial needs of the owner.



What percentage of owners have a written personal transition plan for their business exit?

6% in 2017
41% in 2023

46% INCREASE IN OWNER PREPAREDNESS

As a result of Exit Planning Institute and their CEPA's commitment to exit planning education.

What is A Certified Exit Planning Advisor (CEPA®)?

A Certified Exit Planning Advisor (CEPA®) is an advisor to a business owner that is skilled at aligning business, personal, and financial goals using the Value Acceleration Methodology™ to grow company of significance, ensure a successful transition at the point of exit, and more profitable and better company for the owner today. Acting as central coordinators, or “quarterbacks”, CEPAs integrate the expertise of legal, financial, and accounting professionals to deliver comprehensive, goal-oriented exit plans



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.