CEPA®
Certified Exit Planning Advisor

The Certified Exit Planning Advisor Credentialing Program

NOW THERE IS A BETTER WAY TO LEARN ONLINE.

CEPA® Online Overview

REMASTERED TO DELIVER THE MOST WIDELY ACCEPTED AND ENDORSED EXIT PLANNING PROGRAM

During this 5-day online training, you will experience our virtual classroom, filled with industry masters from around the market, all talking to critical components of the exit planning process and the Value Acceleration Methodology™.

You'll also have access to daily live faculty meet-ups where you'll hear from CEPA faculty members, ask questions related to the material, and get to know your fellow advisors in the program.

PROGRAM COSTS

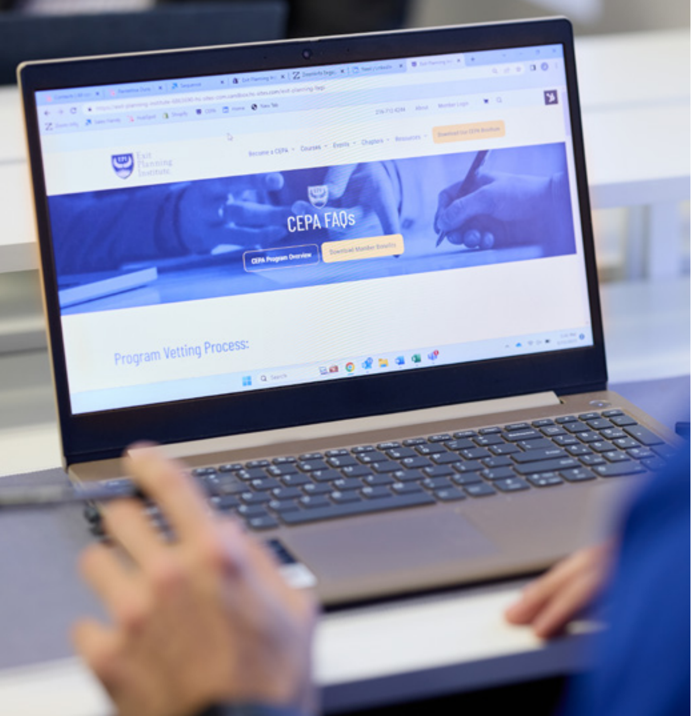
RETAIL COST
$3,500

EARLY BIRD PRICE
$2,600

FOR GROUPS & NATIONAL ACCOUNTS
Call EPI for details at (216) 712-4244

"The CEPA credential is one of the most valuable and useful designations I have in working with business owners. It gave me a knowledge base, vocabulary and process to speak with any Business Owner with confidence. If you want to work with business owners, the CEPA credential is essential."

– CHARLES M. JARRETT, CEPA®, CFP®, CPWATM, CIMA®, CHFC, CLU, CRPC®
PRIVATE WEALTH ADVISOR AT MERRILL LYNCH PRIVATE BANK & INVESTMENT GROUP SENIOR VICE PRESIDENT



CERTIFIED EXIT PLANNING ADVISOR ONLINE COURSE

Developed to exceed your expectations of run-of- the-mill webinar training, the CEPA Online program is a five-day virtual classroom experience that trains and certifies qualified professional advisors with the Certified Exit Planning Advisor (CEPA) credential in the field of exit planning. The masterclass was designed to fill the growing need of the industry.

This is not just another webinar training you'll take alone in your home office. CEPA Online is a production-quality, first-of-its-kind experience delivering education in a way that you will retain and put to use immediately.

MODULES COVERED

- Exit Planning Reinvented
- The Exit Planning Process and Value Acceleration Methodology™ Overview
- Financial Planning for Business Owners
- Integrated Tax, Estate, and Charitable Planning for Business Owners
- Personal Planning for Business Owners
- Introduction To The Triggering Event
- The Basics of Business Valuation
- Value Enhancement Process
- Goals and Objectives
- Creating Action Plans
- Delivering Action Plans
- Exit Options Analysis
- Understanding Private Equity
- Third Party Sales and the M&A Process
- Understanding Family Transitions
- ESOPs As An Exit Strategy
- Importance of Teams

PROGRAM HIGHLIGHTS

Seventeen modules taught with access to live faculty insights and interactive self-study

Obtain the Certified Exit Planning Advisor credential

Earn up to 18 hours of CE Credit & 14 hours of CFP

DAILY AGENDA

5:30 AM DAILY INSTRUCTION

Each day, a new session will become available starting at 5:30 AM EST and should be completed within 24 hours.

4:00 PM EST ZOOM MEET-UP Q&A

Network with your CEPA faculty & classmates during the live Q&A session.

PROGRAM DATES

2025

January 27 - 31
February 24 - 28
March 24 - 28
April 21 - 25
May 19 - 23
June 23 - 27
July 21 - 25
August 18 - 22
September 22 - 26
October 20 - 24
November 17 - 21