BECOME THE MOST VALUED ADVISOR

CEPA®
Certified Exit Planning Advisor

Certified Exit Planning Advisor (CEPA®)

CREDENTIALING PROGRAM

THE AUTHORITY IN EXIT PLANNING

Founded in

2005

The Exit Planning Institute has educated professional advisors for over 20 years

9,000+ Certified Exit Planning Advisors

Includes a network of exit planning professionals from over

18 COUNTRIES

Our community is made up of

Attorneys, Wealth Managers, CPAs & Accountants, Business Brokers, Financial Planners, Valuation Advisors, Investment Bankers, Estate Planners, Commercial Lenders, Consultants, Insurance Professionals, Mergers & Acquisition Advisors

and any other advisor who sits around the table of a business owner.

The Certified Exit Planning Advisor (CEPA®) credential has been approved/recognized by over **40** organizations and institutions nationwide

79% of owners plan to transition in the next 10 years (representing 4.5 million businesses and over $10 trillion in wealth) indicated they have no written personal financial plan

49% have no transition plan

70% and more of businesses that are put on the market do not sell

30% of family owned businesses transition to the second generation and only 12% survive to the third

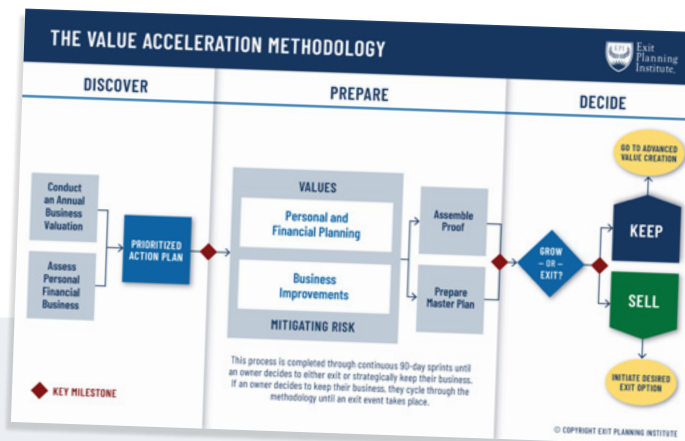
WHAT IS THE CEPA® CREDENTIAL?

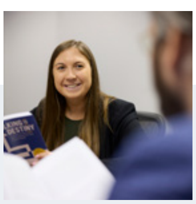
The Certified Exit Planning Advisor (CEPA®) credential is a premier professional designation for advisors who want to more effectively engage business owners and lead value-driven exit planning conversations.

Developed by nationally recognized experts in exit planning, the CEPA program is a week-long, MBA-style experience built on the Value Acceleration Methodology™ — a proven framework that integrates exit strategy into a business owner's business, personal, and financial goals. Through 17 expert-led virtual modules, advisors gain a structured, practical approach to value creation and long-term planning.

Throughout the program, advisors learn Master Planning, also known as the Three Legs of the Stool™: maximizing business value, personal financial planning, and life after business planning. This holistic approach ensures exit planning is focused on what owners can do today to build, protect, and preserve wealth over time.

Advisors who complete the program and pass the proctored exam earn the CEPA credential and join a professional community supported by ongoing education, implementation resources, and collaboration.





HOW CEPA ELEVATES YOUR ADVISORY ROLE

CEPA equips advisors with more than knowledge. It provides a repeatable, actionable framework for guiding business owners through complex planning decisions with confidence and clarity.

As a CEPA, you will be prepared to:

- Lead proactive, value-driven exit planning conversations
- Identify gaps in business, personal, and financial readiness
- Coordinate multidisciplinary advisory teams around a unified strategy
- Apply the Value Acceleration Methodology in real client situations
- Deliver actionable insights that drive value growth before an exit
- Position yourself as the central advisor in ownership transitions

CEPA empowers advisors to move beyond reactive planning and into a more strategic, value-focused role with their clients.

MOST WIDELY ACCEPTED AND ENDORSED EXIT PLANNING CREDENTIAL

WHY CHOOSE CEPA?

Historical, industry data says that around 75% of business owners "profoundly regretted" their exit. As business owners of all ages make up a significant part of the market, it is essential that they can thoughtfully consider their exit at any point in their ownership journey. To do this, they can work with a CEPA, the main point of contact for all aspects of Value Acceleration, to genuinely create and maximize the value of their exit. Owners have dedicated their lives to building their legacy. **Become a CEPA and help them achieve the exit they want, while also expanding your services, deepening your knowledge, and setting yourself apart from the competition.**

Differentiate yourself from your competition

Drive value in your practice and effectively engage business owners

Become more engaged on a business owner's advisory team

Have deeper and more holistic conversations with business owners

Build your team of Exit Planning professionals and expand your network

Access content and hundreds of tools built to further your practice

“Useful and engaging”

The CEPA credentialing program is by far the most useful and engaging content I’ve studied of any credential.

Michael Sheppard, CFP®, CPFA, CEPA® Group Vice President at Thrivent

“The most well-organized program I have experienced”

The CEPA program is the most well-organized, professionally focused, structured program I have ever experienced in my 42 years in the business.

Newly Credentialed CEPA®, 2025

“Not just another credential, it is a solution”

CEPA is more than four letters after my name. CEPA provided a strategic framework. CEPA made me look at everything I did as an advisor differently. CEPA is not just another credential; it is a solution.

Linda Ruffenach, CEPA®, Founder, Chief Strategist, and Business Coach at Execuity LLC

“In one word? POWERFUL”

Amy Wirtz, CEPA®, JD, Consultant at The Family Business Consulting Group, Inc.

“If you want to work with business owners, the CEPA credential is essential.”

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, CFP®, CPWA™, CEPA®, CIMA®, ChFC, CLU, CRPC® Private Wealth Advisor at Merrill Lynch Private Bank & Investment Group Senior Vice President

“The best exit planning credential out there”

This is the best exit planning credential out there. You get a great education through the class and you get continued support from the staff and the network that you get to know through the program.

Brett Spencer, MS, CFP®, CEPA®, Financial Advisor at Impact Financial

ALL PROGRAM DATES:

2026

JANUARY	26 - 30
FEBRUARY	23 - 27
MARCH	23 - 27
APRIL	27 - May 1
MAY	18 - 22
JUNE	22 - 26
JULY	20 - 24
AUGUST	17 - 21
SEPTEMBER	21 - 25
OCTOBER	19 - 23
NOVEMBER	16 - 20

Register for your program today at

EarnCEPA.com

CEPA TIMELINE

Step 1: Choose Your CEPA Program

The CEPA program is offered in three enrollment tiers, providing flexible options for credentialing, exam preparation, and continued professional development. Contact our team at 216.712.4244 or *epiglobal@exit-planning-institute.org* to determine the best fit for your goals.

Step 2: Start Personalized Onboarding

Before your program begins, join a personalized onboarding call with the EPI team to learn logistics, processes, and ask questions.

Step 3: Attend Your Program

Our three-layered learning approach enables you to optimize your learning experience. In the morning, you will view that day's modules, followed by the afternoon self-study exercises. Each day then concludes with a faculty meet up call to address any questions and meet the instructors.

Step 4: Study & Take the Exam

Read exam instructions and review notes before the CEPA exam. The virtual exam is proctored online and must be taken within the designated testing window following completion of the program. Upon passing, you'll receive your CEPA credential.

Step 5: Explore Beyond CEPA

Prepare yourself for success after earning your new credential during a call with EPI's Member Experience Team, to learn the proven process to integrate CEPA into your practice. Walk through how to utilize the EPI Member Center, stay involved in the community, your next steps, credential logistics, networking, and more!

BEYOND CEPA

Beyond CEPA is a curated professional development experience within the Exit Planning Institute community, designed to support advisors after earning their CEPA credential.

Through guided role definition, strategy development, and ongoing education, Beyond CEPA helps advisors translate the CEPA framework into their day-to-day practice. Advisors receive support as they refine how they apply CEPA, deepen their expertise, and continue to grow within the EPI community. Beyond CEPA provides access to implementation resources, continuing education credits, and a dedicated Member Center, ensuring advisors are supported well beyond certification as they apply CEPA in a way that aligns with their goals, role, and practice.

APPLYING THE CEPA CREDENTIAL IN YOUR PRACTICE

After completing the CEPA Credentialing Program, advisors apply the framework in different ways depending on their role, experience, and how they work with business owners. CEPA supports three common application paths.

PATH 1

Build Strategic Connections

For advisors expanding into exit planning who want to build a trusted professional network and confidently collaborate through client introductions.

This path supports:

- CEPAs who want to build their network of exit planning peers
- Advisors focused on relationship-building and collaboration
- Professionals who connect owners with the right expertise at the right time

PATH 2

Strengthen Confidence & Process

For CEPAs who are ready to refine their approach, deepen confidence, and consistently apply the Value Acceleration Methodology in client engagements.

This path supports:

- CEPAs strengthening how they deliver exit planning
- Advisors refining their process and language
- Professionals looking to attract more business owner clients

PATH 3

Lead Business Owner Engagements

For advisors who want to work directly with business owners and serve as a central guide throughout the exit planning process.

This path supports:

- CEPAs working directly with owners
- Professionals with strong expertise seeking the right framework and language
- Advisors focused on leading value creation and transition

After completing the CEPA program, our team is here to help you translate what you've learned into your day-to-day practice. Through guided conversations and ongoing support, we'll help you clarify your goals, apply the CEPA framework with confidence, and identify the path that best aligns with how you work with business owners.

AWARD WINNING CURRICULUM AND METHODOLOGY

PROGRAM CURRICULUM AND AGENDA

Day 1: Exit Planning Foundation & Fundamentals

- **Module 1:** Exit Planning Reinvented
- **Module 2:** Exit Planning Process and the Value Acceleration Methodology™ Overview
- **Module 3:** Financial Planning for Business Owners
- **Module 4:** Integrated Tax, Estate, and Charitable Planning for Business Owners
- **Module 5:** Personal Planning for Business Owners

Day 2: Understanding & Managing Value

- **Module 6:** Introduction to the Triggering Event
- **Module 7:** Basics of Business Valuation
- **Module 8:** Value Enhancement Process

Day 3: Engagement, Fulfillment, & Rhythm

- **Module 9:** Goals and Objectives
- **Module 10:** Creating Action Plans
- **Module 11:** Delivering Action Plans

Day 4: External Exit Options

- **Module 12:** Exit Options Analysis
- **Module 13:** Understanding Private Equity
- **Module 14:** Third-Party Sales and the M&A Process

Day 5: Internal Exit Options

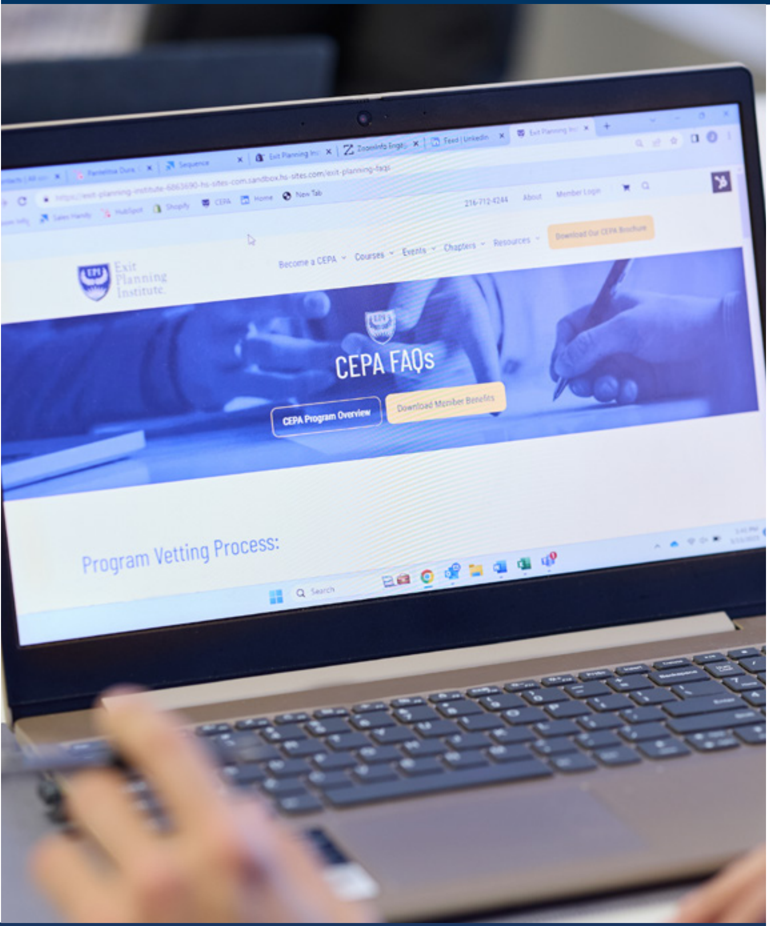
- **Module 15:** Understanding Family Transitions
- **Module 16:** ESOPs as an Exit Strategy
- **Module 17:** Importance of Teams

"...the CEPA program was exceptional. The curriculum was organized, relevant, and immediately applicable to the work I do with business-owner clients. ***The instructors were highly engaging, clearly experts in their fields, and delivered complex concepts in a way that was easy to understand and put into practice.***

I would highly recommend the program to any advisor looking to elevate their practice."

- Newly Credentialed CEPA®, 2025

ONE WEEK. 17 MODULES. THE CEPA EXPERIENCE.



Recommended Course Bundle

Bundle your registration with the CEPA Exam Prep Course to enhance your program experience.

CEPA Exam Prep:

Designed to ensure candidates are set up for success, the CEPA Exam Prep Course strengthens your knowledge of exit planning core concepts and delivers additional and exclusive touch points with your CEPA faculty. Attendees also receive a digital exam study guide for additional practice.

Cost: $349

PROGRAM DETAILS

COST:

$3,500

SCHEDULE:

5 Days

(6 hours per day)

Live faculty meet up calls daily

Up to **18** CPE Hours and **14** CFP Credits.

All other continuing education credits must be self submitted.

PLATFORM:

Online through EPI Academy

CEPA REGISTRATION INCLUDES:

- 5-Day CEPA Credentialing Program experience
- Program manual with presentations and exercises
- Pre-CEPA onboarding session with EPI Fulfillment team
- CEPA examination fee
- Beyond CEPA implementation session with your Member Experience Representative
- 1-Year of Credentialed Plus Membership
- 1 copy of Walking to Destiny: 11 Actions An Owner MUST Take To Rapidly Grow Value & Unlock Wealth

EXTEND YOUR CEPA® EXPERIENCE AT THE

EXIT PLANNING SUMMIT

For advisors who have already committed to earning their CEPA credential, the Exit Planning Summit deepens understanding, strengthens confidence, and brings the Value Acceleration Methodology into real-world focus. Through expert-led sessions, peer conversations, and practical insights, advisors see how CEPA is applied across disciplines.

For those still considering CEPA, the Exit Planning Summit offers a firsthand look at the framework, the community, and the impact of exit planning in practice. Many advisors find that attending the Exit Planning Summit provides the clarity and conviction needed to take the next step toward becoming a CEPA.

Whether you are beginning your CEPA journey or looking to build on it, the Exit Planning Summit connects education, application, and community in one immersive experience.

EXPERIENCES. PEOPLE. INNOVATION.

LEARN MORE AND REGISTER AT

EXITPLANNINGSUMMIT.COM

MORE THAN A CREDENTIALING PROGRAM, A COMMUNITY.

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