ACCELERATOR PROGRAM FAQ'S

PROGRAM OVERVIEW

What exactly is the CEPA Accelerator Program?

The CEPA Accelerator Program is a 12-month mastermind-style peer group exclusively for CEPAs who want to turn their certification into tangible business growth. It combines curated content, real-world peer learning, and accountability focused on working with business-owner clients.

How is this different from the original CEPA training or Value Acceleration Methodology course?

The CEPA course provides you with the framework; the Accelerator helps you apply it—month by month, client by client—to drive measurable ROI and referral growth.

Who leads the program?

The sessions are co-led by:

- **Tina Corner Stolz** – Founder of LXCouncil and peer-group expert
- **Mike Garrison** – Creator of Strategic Referral Team and EPI Member of the Year
  Both are veteran facilitators and CEPAs.

What are the key goals or outcomes I can expect?

- Forge 5+ deeper business-owner relationships
- Target 20 qualified business-owner prospects
- Build a predictable referral and COI system
- Increase your client and revenue pipeline
- Learn to communicate as the primary advisor for business owners

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PROGRAM FORMAT & STRUCTURE

How is the program structured over the year?

- **Month 1:** Two 4-hour virtual sessions (foundational learning)
- **Months 2–12:** Monthly 2-hour peer-group sessions (content + COPI″ processing)
- **Ongoing:** Access to a private community for collaboration and resources

What is COPI″ processing?

COPI″ (Challenge, Opportunity, Problem, or Idea) processing is a peer-learning method where members bring a real-world scenario to the group for real-time feedback, solutions, and accountability.

How large are the groups?

Each cohort is capped at 10 vetted advisors from non-competing geographic areas to ensure confidentiality and high engagement.

What topics are covered throughout the year?

Examples include:

- Business-owner mindset
- Pricing and planning fees
- Referral systems that 3x results
- Building COI & ESP networks
- Handling challenging referrals
- Anchoring success habits and proactive referral research

Is there an onboarding process?

Yes. The program begins with a 90-minute onboarding session, which includes a business analysis worksheet to set your benchmarks and success goals.

INVESTMENT & ROI

What is the cost and payment schedule?

The total investment is **$12,000**, paid as follows:

- $3,000 in Month 1
- $3,000 in Month 2
- $1,000 per month for the next six months

Do I earn CEPA Continuing Education (CE) credits?

Yes. Participants earn **36 CE credits** toward the 40-hour CEPA renewal requirement (every three years).

What kind of ROI have past participants achieved?

Alumni have reported:

- Greater confidence in discussing exit planning with clients and prospects
- Increased referrals and COI activity leading to new client prospects (as high as $50M)
- Doubled or tripled fees (e.g., from $2,500 to $5,000–$7,500 or $5,000 to $12,000)
- Streamlined client acquisition processes
- More clarity, focus, and enjoyment in their business

PARTICIPATION & FIT

Who is this program best suited for?

The Accelerator is ideal for CEPAs who:

- Want to monetize their credential
- Are proactive, collaborative, and results-driven
- Are willing to share, learn, and be held accountable
- Want to deepen business-owner relationships and COI networks
- Have been a CEPA for at least one year
- Work directly with business owners

What's the expected time commitment?

Approximately **3–4 hours per month**, including preparation and meetings. The program is designed to fit around a full-time advisory practice.

What happens after the 12 months?

You graduate and are encouraged to stay in touch with your peers as you continue your journey working with business owners.

ENROLLMENT DETAILS

When does the next class start?

There is currently a waitlist for the next Accelerator class. Once 10 participants are confirmed, the class will begin based on everyone's schedule. Seats are limited to maintain quality interaction.

How do I apply or register?

Visit exit-planning-institute.org/program/cepa-accelerator or email MemberExperience@BeyondCEPA.com to secure your seat.

Can I talk to someone before enrolling?

Yes. You can reach out directly to:

- **Tina Corner Stolz:** tina@lxcouncil.com
- **Mike Garrison:** mike@strategicreferralteam.com

MEMBER TESTIMONIALS

“Established a more refined client acquisition process — better taking into account value acceleration and the owner’s mindset. Added more than 20 new COIs to my network and did so with the goal of building business together, not just networking. Certainly, I got better at the *Can I Borrow Your Car* framework. Really better understood the advisor’s lane and why it’s okay to stay there. And had fun — certainly not a SMART goal (which I’m bad at), but having fun is a core value!”

– David Elder, CFP®, CEPA
Wealth Manager / Partner, Merit Financial Advisors

“I gained a lot of confidence discussing exit planning and was able to put together a strong team of professionals. There are many deals now in process.”

– Faheem Khwaja, CFP®
Wealth Advisor, Merrill Lynch

“The program was helpful in giving me more clarity on how to build business through referrals.”

– John Gould, CFP®, CPWA®, CPM®, CEPA
Financial Advisor, Morgan Stanley Wealth Management

“I cannot thank Mike Garrison and Tina Stolz enough for their efforts in running the CEPA Value Accelerator Program. As a wealth manager, I wanted to build on my CEPA certification and make it a tangible part of my business plan — helping business owners grow the value of their companies, realize increased profits, and successfully exit. The CEPA Value Accelerator Program is a tremendous enhancement to the foundational programs offered by EPI.

Mike and Tina have designed this mastermind experience similar to the Entrepreneur Organization (EO) model, where like-minded wealth managers and value advisors share expertise, confront challenges, and collaborate on solutions. Combined with dedicated training on building a referral network of business owners — in a way that’s authentic and fiduciary-focused — the program has transformed how my team approaches referral conversations.

For any wealth manager or value advisor who wants to expand on the CEPA and EPI framework, I highly recommend this program. More things are clicking for me, opening my eyes, and improving my ability to grow my business through working with business owners.”

– Adam Freeland, CFP®
Managing Principal, The Hartford Financial Group