Exit Planning Institute®

THE 120-DAY PLAYBOOK

Building the foundation for your exit planning approach with business owners through optimizing the Certified Exit Planning Advisor Credential.

SECTION 1:

120-Day Playbook Monthly Action Plan

The 120-Day Playbook is broken into two sections. Section 1 provides the new CEPA® with the monthly playbook needed to effectively integrate the CEPA credential and Value Acceleration Methodology™ into who you are now as an advisor. Section 2 provides critical insights to effectively navigate your Beyond CEPA Path and this workbook.

The 120-Day Playbook includes the CEPA Development Scorecard. These can also be found in your Member Center. These scorecards should be considered in your development path. They include a variety of elements that the CEPA should be completely familiar with to ensure success on their Beyond CEPA Path. Providing them the right networking, knowledge builders, courses, programs, and general education needed to build upon earning their CEPA credential.

The following pages of this playbook include the monthly plans, called Action Item Lists, for the first 120-days that make up the Foundation and Implementation Phase of the Beyond CEPA Path. Use these monthly Action Item Lists to guide your month's actions and ultimately choose your development path as a CEPA. Which is the key deliverable of the 120-Day Playbook. This decision, once made after the 120 days, will move you into the Integration Phase of the Beyond CEPA Path and towards best-in-class practices talked to in the 120-Day Playbook.

In your Month 4 Action Item List you will be asked to download and read the "Best-in-Class CEPA Profile" whitepaper. This whitepaper profiles what top CEPAs have done and are doing to continuously grow and position themselves with business owners. This is one of the last action items you will complete as it allows you to focus yourself on continuing to build out your strategy post 120-Day Playbook.

THE BEYOND CEPA PATH

Exit Planning Institute®

YOU ARE HERE!

FOUNDATION & IMPLEMENTATION

4 MONTHS

Lay a solid foundation for the rest of your CEPA journey.

INTEGRATION

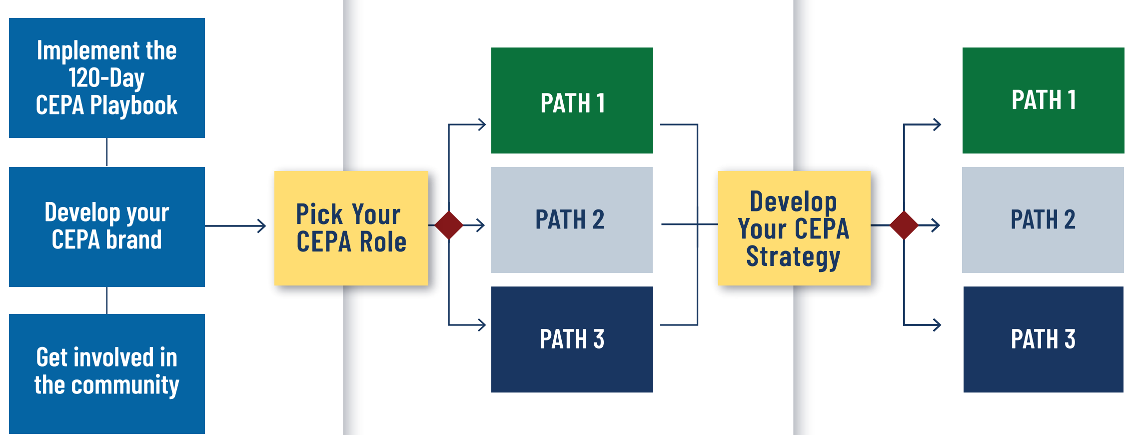
12 MONTHS

Strategically integrate your chosen role as a CEPA.

EXPERTISE & GROWTH

26 MONTHS

Expand your knowledge, build your practice, and position yourself within the EPI Community.



Path 1: Focuses on deeper, holistic conversations with business owners and connects with like-minded advisors to drive new opportunities.
Path 2: Manages and coordinates the Value Acceleration Methodology™ or one of its key paths within the Prepare Gate.
Path 3 : Leads the business improvements path, creating action plans and guiding the owner through exit options and value acceleration efforts.

Days 1-30 of 120 Days

The first month of your Beyond CEPA Path is critical. It begins to lay the foundation for everything Beyond CEPA and your overall success as a new CEPA. Within the first month you will complete the 90-Minute Launch Meeting. Below are the critical items that must be completed within the first month. There is a separate meeting agenda and Action Item List for the 90-Minute Launch Meeting that you will complete during that time. You should follow from top to bottom the 90-Minute Launch Meeting action item list and complete the tasks in order.

The 90-Minute Launch Meeting Agenda and Action Item List

(complete list during working meeting)

	ACTION
☐	Download and read "CEPA Asset How To" guide.*
☐	Download and read "CEPA Social Sharing" guide.*
	**The "CEPA Asset How To" guide and "CEPA Social Sharing" guide can be found in the member resources within your EPI Member Center account.*
☐	Place CEPA® mark after your name in your signature line email.
☐	Place CEPA® mark after your name and affiliation to EPI on your LinkedIn.
☐	Follow Exit Planning Institute® on LinkedIn and Subscribe on the EPI Website for Updates.
☐	Create a post including a customized CEPA announcement and banner from your Member Center portal on LinkedIn. Tag Exit Planning Institute in your post.
☐	Download "Share a Press Release" from your Member Center portal*.
	**Our recommendation is to edit this document to announce your new credential. You can now give this to your marketing team, share this yourself on your social platforms, send it to local journals or magazines, place it onto your website, or in a company newsletter.*
☐	Review your company website and brainstorm where you can begin to incorporate some of the content, branding, and resources to showcase yourself as a CEPA.
☐	Review and familiarize yourself with the next 3 months of Action Item Lists found on the following pages, 7, 9, 10, & 11.*
	**To maximize the impact, schedule out these items on your calendar so you can complete and stay on the success path over the next 90 days.*
☐	Schedule the next 3 accountability meetings on your calendar for Month 2, 3, and 4.

Pro Tip

Consider involving key individuals within your firm or external vendors who support your organization during the first 120 days. These individuals can provide valuable expertise in areas such as marketing, business development, and project management, and their involvement may be instrumental in ensuring the success of your initiatives.

Month 1: Action Item List

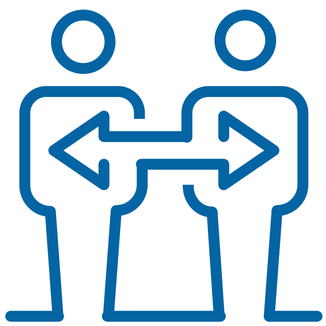
(complete over the next 30 days)

	ACTION
	Schedule and complete the 90-Minute Launch.
	Schedule and attend a group CEPA Next Steps Call. All dates and times can be found in your Member Center, *exit-planning-institute.org/knowledge/new-cepa-next-steps*.
	Read the 120-Day Playbook Chapter 1: The Beyond CEPA Path.
	Read the 120-Day Playbook Chapter 2: What is an Exit Planner?
	Download and read the “What is a CEPA?” whitepaper.*
	**You can download and read this whitepaper in your member center.*
	Navigate to *exitplanningsummit.com*. Review the event, past or current sessions available, and networking opportunities*.
	**Consider attending this event. It is the most impactful next step as a CEPA as it allows you to network with some of the best-in-class CEPAs.*
	Over the next 30 days, begin reviewing content within your Member Center to familiarize yourself and develop any questions you may have for your EPI Account Manager.
	Contact and schedule a 30-minute one-on-one call with your EPI Account Manager. Your Account Manager’s goal is to help you maximize your membership through networking and providing valuable insights to further benefit your practice and professional growth.

CONSIDERATIONS FOR THE FOLLOWING MONTHS

Branding, Marketing, Business Development

- What content do you want to utilize to make regular thought leadership posts on platforms like LinkedIn and your blog?
- Do you have an editorial calendar? Should you create one to help with posts?
- What current teammates should be involved in these early phases with you? Consider someone like a marketing assistant, business development person, partner or assistant.
- Does the content need to be compliance approved?
- Should you be updating your website to incorporate VAM elements, if so how? Should a full knowledge center be incorporated?



Effective Language and Conversations with Owner and Advisors

- Can I thoroughly explain the key leadership concepts of the Value Acceleration Methodology? 5 Stages, 4Cs, 3 Gaps, 2 Paths, 1 Goal?
- Can you thoroughly explain the 3 legs of the stool?
- Can you describe the value of the VAM and your role within it?
- Have you explored the conversation starter tools and content within the Member Center?
- Do I need a supplemental course to build out my language? If so, check out Empowering Conversations with Owners.

Who is my Team?

- What role do I play in the Value Acceleration process?
- Do I understand all the exit planning team roles?
- What teammates am I lacking from the Core Team and who should I meet?
- What teammates am I lacking from the Functional Team and who should I meet?
- What am I doing to meet like-minded and collaborative fellow advisors?

Days 31-60 of 120 Days

The beginning of the foundation has been laid in Month 1. It is now time to dive a bit deeper into the actions that are a part of the Month 2 plans. This month should end with a simple 60-minute check-in meeting. In this meeting you should confirm the Action Item List below is completed. These check-in meetings are always good to host with your team supporting you or with your Account Manager at EPI. It helps with accountability, and you can confirm any questions or open items.

Monthly Challenge:

Have five 30-minute conversations with current CEPAs. You can find a CEPA to connect with at *FindACEPA.com*. These professionals can be valuable resources for your 120-Day Playbook and Beyond CEPA Path, serving as both mentors and guides.

Take your introductions a step further by reaching out to your EPI Account Manager, who can provide warm introductions to these CEPAs for a more personalized connection.

Month 2: Action Item List

(complete over the next 30 days)

ACTION
Read the 120-Day Playbook Chapter 3: Becoming a Best-in-Class CEPA.
Review CEPA Think Tank schedule within your Member Center and schedule out which CEPA Think Tanks you can attend over the next several months.*
Download and read “The Key Concepts that Intrigue Business Owners”.*
Download and read “Walking to Destiny Conversation Starters”.*
Download and read “From Successful to Significant”.*
Download and read “Mastering the Market: My Pursuit of Best in Class”, *masteringthemarket.com*.
Watch “Integrating Yourself into the CEPA Community” webinar.* *Coming Soon!*
Watch “How to Commercialize Your CEPA and Credentials” webinar.*
**You can find all the documents to read, download, and watch in your Member Center.*

61-90 Days of 120 Days

As we move deeper through the 120-Day Playbook we will begin to investigate which path and role is right for you as a CEPA. This path is the key deliverable of the first phase of the Beyond CEPA Path: Foundation & Implementation.

This month should end with a simple 60-minute check-in meeting. In this meeting you should confirm that the Action Item List below is completed. These check-in meetings are always good to host with your team supporting you or with your Account Manager at EPI. It helps with accountability, and you can confirm any questions or open items.

Monthly Challenge:

Begin posting regularly on LinkedIn utilizing your Member Center content. Go into the "Integrating CEPA: Branding, Marketing, and Business Development" folder inside of your Member Center and download the infographics. Start by posting one infographic per week on LinkedIn accompanied by your opinion or a story of why the concept depicted in the infographic is important to business owners. Tag Exit Planning Institute in your post for maximum exposure.

Month 3: Action Item List

(complete over the next 30 days)

	ACTION
☐	Read the 120-Day Playbook Chapter 4: Choosing Your CEPA Development Path.
☐	Download and read "So You're a CEPA, Now What?" whitepaper.*
☐	Download and read "A Look Into the Unique World of Value Creation" whitepaper.*
☐	Watch "Empowering Conversations with Owners" webinar.*
	**Consider Empowering Conversations with Owners EPI Academy Course.*
☐	Watch "My Discovery Gate Journey from Hesitation to Excitement" webinar.*
☐	Watch "How to Build Your Exit Planning Dream Team" webinar.*
☐	Watch "Collaboration: Simple not Easy" webinar.*
☐	Watch "The QB Job Description" webinar.*
	**You can find all the documents to read, download, and watch in your Member Center.*

Days 91-120 of 120 Days

You are now in your last 30 days of the 120-Day Playbook. This is a critical time. In 30 days, you will have gained enough foundational knowledge to pick your path as a CEPA. Once you have chosen the path of development, you will move into the second phase of the Beyond CEPA Path: Integration.

It is critical to your success that you have intentionally completed all the Action Item Lists over the last 90 days. If you have not, complete these items within the Month 4 timeframe.

This month should end with a simple 60-minute check-in meeting. In this meeting you should confirm the Action Item List below is completed. These check-in meetings are always good to host with your team supporting you or with your Account Manager at EPI. It helps with accountability, and you can confirm any questions or open items.

Month 4: Action Item List

(complete over the next 30 days)

	ACTION
☐	Read the 120-Day Playbook Chapter 5: Utilizing EPI Resources.*
☐	Download and read the "2023 State of Owner Readiness Survey Report".*
☐	Download and read the "5-4-3-2-1" whitepaper.*
☐	Watch "Cracking the Code: Proven Tactics for More Referrals" webinar.*
☐	Watch "Fireside Chat Series" with Chris Snider.*
☐	Navigate to *exit-planning-institute.org* and click on the Resource tab, then on Partner Network. Review and familiarize yourself with EPI's product and service partners and providers. These will come into play, dependent on your chosen development path, when you move into the Integration Phase.
☐	Download and read "The Best-In-Class CEPA Profile" whitepaper.*
☐	Pick Your Development Path. Once you have chosen this path, you can move into the Integration Phase allowing you to begin more specific, directed, and intentional training and professional development items associated with your selected path and this next phase.

**You can find all the documents to read, download, and watch in your Member Center.*

SECTION 2:

Navigating Your New Credential

CHAPTER 1: BEYOND CEPA

You are now a Certified Exit Planning Advisor (CEPA) and the next 4 months are critical to your success. The Beyond CEPA Path is a roadmap that helps you to achieve success as a new CEPA in the market. The path consists of three major gates that are designed using the gated thought process that is the Value Acceleration Methodology. To pass into the next gate or phase of the Beyond CEPA Path, you must produce a final deliverable. The process begins with Foundation and Implementation, moves to Integration, and ends with a continuous cycle of Expertise and Growth.

This playbook focuses on the first 120 days after receiving your CEPA credential which are the most critical days laying the foundation of becoming a Certified Exit Planning Advisor. You can think of this first Foundation Phase as "Protect Value," a part of the 5 Stages of Value Maturity (a key leadership concept of the Value Acceleration Methodology you learned during your training). One must protect value before they can strategically build it which is why in the 5 Stages of Value Maturity, Protect Value always comes before Build Value. Similarly, the newly minted CEPA must lay a foundation that embeds the methodology, language, approach, and team into their brand and their current approach to working with business owners. If done well, and in partnership with the other two phases, the CEPA will experience success in the market. **Before we discuss this 120-Day Playbook and the Foundation and Implementation Phase, let's visit the other two phases briefly.**

PHASE TWO: INTEGRATION

Integration is a complex and critical piece to your CEPA journey. After the first four months of laying the appropriate foundation, you will pick your role as a CEPA. In the Integration Phase you will focus on that role and begin to integrate the elements of that role into who you are and into your practice. This phase is 12 months. Within those months you will integrate the CEPA credential into your existing practice dependent on what role you choose, begin expanding your Value Acceleration Methodology knowledge, and start forming your CEPA team of multi-disciplinary advisors. Using the 5 Stages of Value Maturity analogy, you are now beginning to more strategically "Build Value" or build out your practice as a CEPA.

PHASE THREE: EXPERTISE AND GROWTH

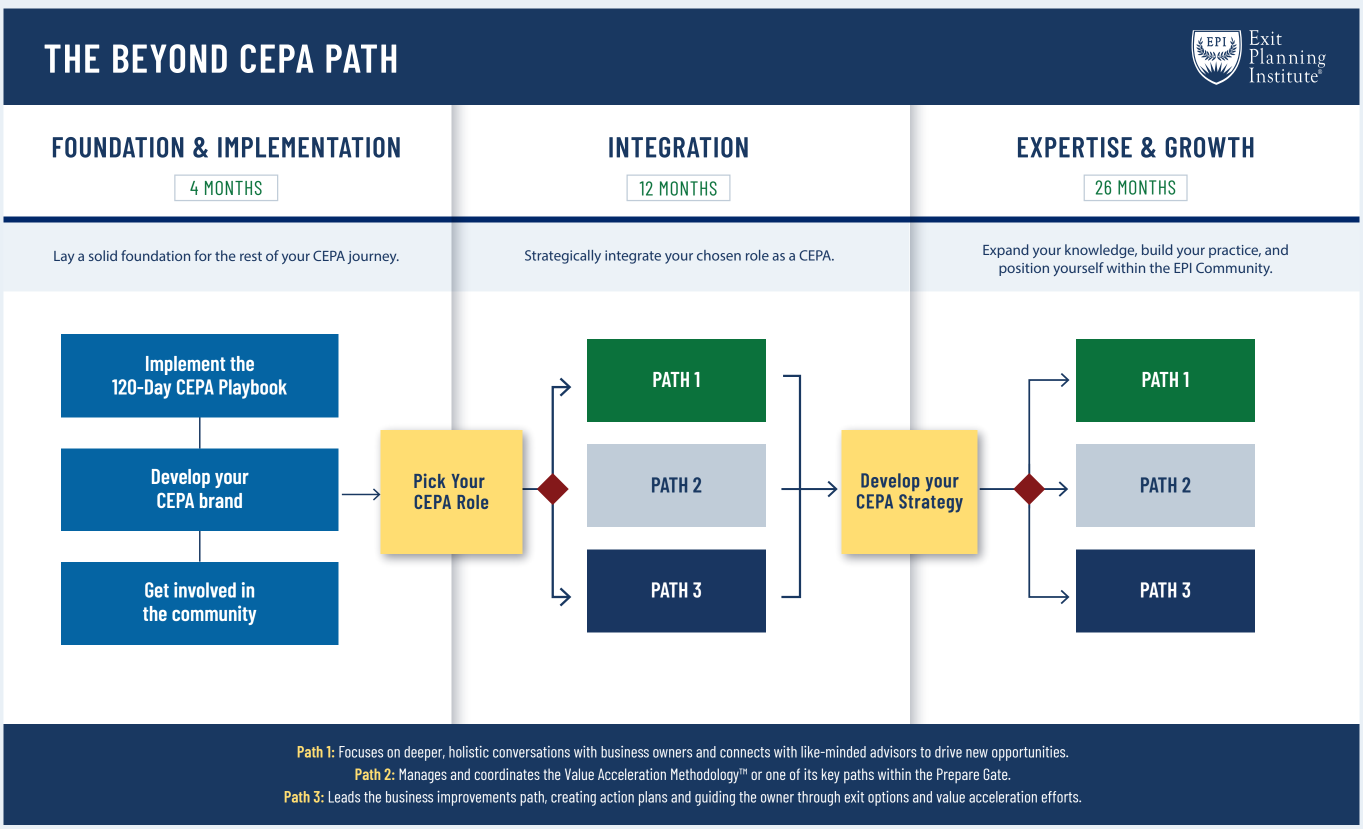
The continuous phase of Expertise and Growth. There is a foundation of this phase that focuses on a 26-month period, but thereafter the CEPA must embrace a “purposeful growth” mindset in their career as a CEPA. Why? Because the profession is still new and as more owners adopt and embrace the methodology, we as professional advisors and educators learn more and evolve along with it. This phase will be critical for the CEPA who wants to become the Value Advisor (this is something we’ll dive into when we discuss CEPA Roles in Chapter 4).

For all CEPAs, this phase of the Beyond CEPA Path focuses on enhancing collaboration and teams, deepening your exit planning knowledge, building a stronger professional network, and achieving the required continuing education credits needed to maintain your CEPA credential. Here, the CEPA has access to peer groups, mastermind groups, collaboration conferences, and knowledge building courses.

LET’S DIVE IN:

THE FOUNDATION AND IMPLEMENTATION PHASE

The most critical of the three phases, Foundation and Implementation focuses on completing this 120-Day Playbook. Once completed, the foundation of who you are as a CEPA will be set. It ensures you can effectively implement your CEPA credential and training. It helps you develop a clear understanding of who you are as a CEPA, it develops a rhythm and strategy for future success and produces best practices for you and your firm. When you conclude this phase, you will need to pick your role as a CEPA, thus setting you on a path of growth and development.



THE 120-DAY PLAYBOOK

The 120-Day Playbook is set up to be a workbook guiding you along the Foundation and Implementation Phase of the Beyond CEPA Path. It gives you action items and deliverables to complete each of the four months and will take discipline and intentionality to complete. If you have a team (ex. marketing support, sales support, administrative support, or business partners) you may consider bringing them into the fold as accountability partners or as people who may complete some of these actions and deliverables for you.

On the following pages you will see your four-month layout and be introduced to different CEPA Development Scorecards for each of the CEPA roles. All CEPAs begin at Path 1 and will need to complete the CEPA Development Scorecard accordingly to advance to the next phase of development along the Beyond CEPA Path.

It is highly recommended that you attend a 30-minute Beyond CEPA Path Call with your EPI Account Manager. By attending this call, you can dive deep into this playbook, and they can coach you through the first phase of the Beyond CEPA Path. Your EPI Account Manager will be a major help to ensuring your success as a CEPA. You should lean into your account manager and the overall team regularly, but it all starts with scheduling time with them to go through this workbook on your Beyond CEPA Call.

In addition, there is an EPI Academy course that supplements this workbook: Implementing the 120-Day CEPA Playbook. If you would like a deeper understanding with case study examples of the Foundation and Implementation Phase of the Beyond CEPA Path this course is for you and can be found in the EPI Academy catalog.

MILESTONE MEETINGS AND PULSE CHECKS

Inside of the 120-Day Playbook are four individual milestone meetings with associated action items and deliverables. These include the 90-Minute Launch plus three 60-Minute Pulse Meetings.

THE 90-MINUTE LAUNCH

This should be done within the first 30 days of becoming a Certified Exit Planning Advisor (CEPA). It should be planned out, scheduled on your calendar, and a very intentional working meeting with yourself where you accomplish several action items within the 90-Minutes. This is where you will also schedule your Beyond CEPA Call with your EPI Account Manager.

THE 60-MINUTE PULSE

These three meetings will be scheduled out on your calendar during your launch meeting. These are checkpoints or accountability pauses, that allow you to align yourself, your team, and your practice around completing the foundational phase of the Beyond CEPA Path. These meetings will take place in Month 1,2, 3, and 4 of the 120-Day Playbook.

CHAPTER 2: WHAT IS AN EXIT PLANNER?

What is an Exit Planner? Knowing this definition and your role within the exit planning space will be essential to your success as an exit planner. Before we investigate what an exit planner is, we must first understand what exit planning is.

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 through aligning the three legs of the stool. 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.

How do you fit into this definition now that you are a Certified Exit Planning Advisor? Are you an Exit Planner? The answer to this question lies within the definition of an Exit Planner.

An Exit Planner is a professional trained in the Value Acceleration Methodology, skilled at aligning business, personal, and financial goals to cultivate a company of significance and ensure successful transitions. They act as expert collaborators and connectors, understanding that exit planning involves teamwork across various disciplines. As educators and practitioners, they motivate and empower business owners to proactively engage in exit planning. An Exit Planner goes beyond the traditional notion of a consultant, playing a multifaceted role essential for achieving significant exits.

Whether you are a financial advisor managing the owners Wealth Gap, a growth consultant helping to scale and optimize the owner's company, an attorney helping mitigate risk in the owner's company or estate, or one of the many advisors that help the owner blend and balance their business, personal, and financial goals, you are an Exit Planner.

Next, we need to investigate what role you want to play as a CEPA. But before we venue into the next chapter complete this month's Action Item List to begin to tell your network who you are as an Exit Planner, now Certified Exit Planning Advisor.

CHAPTER 3: BECOMING A BEST-IN-CLASS CEPA

Exit planning as a profession started in the late 1990's when professional advisors who worked with business owners in a variety of capacities started to really see the private market move with the transition of Baby Boomer-owned companies who, at the time, made 60% of the privately held company market.

In 2005, the Exit Planning Institute was founded, and by 2007 the founders of EPI launched the Certified Exit Planning Advisor Program. Since that point, thousands of advisors have joined the CEPA Community and EPI has researched what has made them not just successful but best-in-class.

Today, the best-in-class advisors to business owners embrace three key elements.

1. They mastered VAM language.
2. They are connectors of people.
3. They are lifelong learners.

They also have embraced two critical characteristics that business owners are asking for in their advisors

1. They build relationships with their owners and the owners' teams and families.
2. They help the owner as an accountability partner.

BEST-IN-CLASS ELEMENTS

Key Element One: Mastering the Value Acceleration Methodology Language.

Best-in-class advisors have mastered the VAM language and have integrated it into their approach with business owners. This has enabled them to communicate rather complex exit planning concepts and strategies effectively to business owners. It has also allowed for a deeper connection between the business owners and their teams.

As a CEPA, you are now a specialized advisor. You now hold a language, framework, process, and approach that compliments your existing expertise, whether that be investment management, mergers and acquisitions, accounting, growth consulting, amongst other professional disciplines we hold as CEPAs. The best-in-class CEPA has expanded their story to incorporate that of Value Acceleration. Utilizing an approach that connects with business owners differently and more significantly than other advisors.

Embracing the VAM language means the CEPA has not only verbally changed the way they speak to owners, but they have also embraced this language in their branding and approach. It is who they are, it is what they look like, and how they carry themselves as an advisor to owners.

EMBRACING THE LANGUAGE

If you were on a plane and started up a conversation with a person next to you, and learned through your conversation with them that they were a business owner, how would you position the conversation? Would you lean into their pain points and desires? Talk to them about what makes a significant company? Go deeper as you proceed through the conversation about what makes a business valuable or perhaps their wealth gap?

INCORPORATING THE APPROACH

The best-in-class CEPAs have incorporated the language of VAM into their websites, collateral, and other branding elements. People know they are an advisor that supports business owners; they know they are a CEPA. Best-in-class CEPAs have a knowledge center, or an equivalent, on their websites where the owner, their teams, or someone in the center of influence can go to and learn more about VAM. They have become a thought leader in the space, speaking regularly to VAM in their materials, engagements, and on their social platforms.

Key Element Two: Connecting and Collaborating

Best-in-class CEPAs connect people and are expert collaborators. They understand that exit planning is a team sport. They have made the effort to dive deep into the EPI Community of advisors and build relationships that they can bring into their engagements with business owners when the time comes for that specific advisor to be involved. They understand which advisors are fit for the three gates of the methodology. They introduce advisors along the way that help influence, impact, and support the business owner, their teams, and their families.

This is a very intentional approach as it takes time to meet and match with the advisors you like and match your philosophy, style, and client type. Networking and integrating into the community are key. Understanding which advisors you may be missing on your team is also key in filling the spots. The best-in-class CEPA also ensures they have options. They believe in introducing the business owner to two or three different advisors and helping the owner pick who they may fit best with. For example, if the owner needs an estate planning attorney, the best-in-class CEPA would introduce three attorneys to consider.

To build out this team of advisors, the best-in-class CEPA has leaned hard into their EPI Account Manager for personalized introductions and has invested the time and money into attending The Exit Planning Summit and registering for the free CEPA Think Tanks as these are two key platforms to meet a variety of people who you may grow to learn, like, and team with.

Key Element Three: Lifelong Learners

Undoubtedly as the Value Acceleration Methodology is embraced by more and more business owners, we learn more as educators, advisors, and the overarching EPI Community. The CEPA comes out of the CEPA Program with a very wide understanding of the methodology but not necessarily a very deep understanding of the multiple elements within it. **Best-in-class CEPAs invest in their development.** They are people that believe in purposeful growth and are also people who believe in testing this approach in their own practices and careers.

As a CEPA who also owns their own advisory practice, are you embracing the methodology yourself with your teams? Have you tested what you now teach to owners? If you are a part of an advisory firm, have you embraced the three-legged stool approach? Do you know what you'd like to do in your next act of your life? Have you shared it with your team, family and friends?

The Exit Planning Institute believes in this best-in-class characteristic and as such has a requirement of their CEPAs to invest in 20-hours of Value Acceleration Methodology-centric education every three years. These hours are called "EPI-Hours". They can be gained through two platforms, a free platform and a deep dive platform.

The deep dive platform consists of programs like: The Exit Planning Summit, EPI Academy, and other focused programming. The deep dive platform programs typically give the CEPA numerous amounts of credit hours at once, but require a deeper commitment, intentionality from the CEPA, and there typically in a cost associated to the program. The programs also have a variety of more profound benefits from sessions with specialized experts and instructors, basic and in-depth topics, workbooks, case studies, and networking.

The free platform offerings include webinars, bi-weekly CEPA Think Tanks, and a wide variety of virtual and in-person meetings that are a part of our Chapter Network. These all cover a variety of general exit planning and Value Acceleration Methodology specific topics, but typically only come with one to two hours of continuing education credit. As it states in the platform's name, these programs are typically free of charge or require a minimal registration fee to cover meeting costs typically associated with the local or regional chapter event.

Overall, the CEPA invests most in learning for their benefit, the benefit of their teams, and the business owners they represent. As more and more business owners begin to embrace and adopt the Value Acceleration Methodology, we, as an EPI Community, also must continue to learn more and reinvest into the methodology allowing it to evolve to fit our owners' needs and realities.

"Overall, the CEPA invests most in learning for their benefit, the benefit of their teams, and the business owners they represent."

CHAPTER 4: CHOOSING YOUR CEPA DEVELOPMENT PATH

The Certified Exit Planning Advisor (CEPA) credential is always an addition to who you are as a professional advisor. It provides you with a unique differentiator that showcases how you add specific value to business owners. You will likely always focus on your expertise and the lane you are currently running in, but you will utilize the CEPA credential, your member benefits and resources as CEPA, and your EPI Community to expand your network and enhance your approach with business owners.

The most critical part of the 120-day playbook path is choosing who you are as a CEPA and what role you want to play to the business owner. There are three roles you can play as a CEPA ranging from more basic in form to the more complex. Think of these roles as a pyramid. Building upon each other as you move up to the top, the most complex of the CEPA types. **Ask Yourself: Is This You?**

PATH #1

You are an advisor who has become a CEPA primarily because they want to expand their knowledge on what it takes to drive value into a company and align the business owner's business, personal, and financial goals. Someone who wanted to expand their network of advisors who work within this business owner space. They will likely never incorporate the deliverables of the Value Acceleration Methodology and would prefer to stay entirely in their lane of expertise in their existing practice. However, they will change their approach and language with a business owner now that they are a CEPA.

Your journey in development will focus primarily on your expanded knowledge of the Value Acceleration Methodology and building out your network of multidisciplinary team members so you can better connect advisors to your business owner clients and become a better connector of people. You will want to develop your language, conversation, and team.

Activities in this development journey can include attending The Exit Planning Summit, webinars, exclusive CEPA Think Tanks, utilizing your Member Center resources, and leaning into the Chapter Network as well as your EPI Account Manager for key introductions and practice support.

PATH #2

You are an advisor who likes to act as a project manager for the Value Acceleration Methodology initiative. These advisors help to lead the 90-day sprints, the selection of big rocks for both the business and personal paths and help manage the overall advisory group of core and functional specialists coming in and out of the equation. This path leads this project and is a key point person for the owner and their team. They may also conduct educational workshops for the business owner helping them prioritize the action plan, do personal envisioning exercises, host quarterly renewals, amongst other workshops and deliverables apart of the overall methodology. This CEPA charges a monthly retainer fee to manage the Value Acceleration project.

Your journey in development will focus on having a deeper understanding of the Value Acceleration Methodology while aligning yourself with several different types of professional advisors who may surround the business owner. You will be the connector of people, and as such the owner and their teams will rely on you for relationships with experts who can help drive value into their company and align business, personal, and financial goals. You will also need to focus on relationship and project management, likely integrating some type of software tool to help manage the overall project.

Activities for advancement would be items such as attending The Exit Planning Summit regularly, leaning into the EPI Account Management team for introductions to fellow advisors helping to build out your team, and integrating some type of project management software into your approach. These activities will deepen after you master Path 2 and look to lean into your role as a CEPA when you enter the Expertise and Growth phase of the Beyond CEPA Path.

PATH #3

You are an advisor who embraces all the characteristics of the above two paths but goes deeper into the business improvements sector. You are a value advisor, a growth consultant, a management consultant, or even a business coach. Or, if you don't currently embody those roles, you are considering this as a part of your service offerings to owners. CEPAs on Path 3 are typically the business growth consultants, business coaches, or at times, the CPA or a part of the accounting firm. This CEPA path embraces the full Value Acceleration Methodology. They will likely conduct many, if not all, the deliverables of the methodology including the Triggering Event Engagement and the workshops that form the Prioritized Action Plan. They will manage and deliver on big rocks of the Business Path in the Prepare Gate and likely help ready the business for an external or internal sale or transition. This CEPA will develop a pricing model for the methodology and charge for the various deliverables within it. The methodology may take form in their practice directly, meaning they will take the methodology and integrate it into their existing consulting practices. Or they may evolve and adopt the methodology in part marrying it to what they currently provide to business owners. Their key teammate will be a CEPA who is a Financial Advisor, as the Financial Advisor is the one who will oversee the Personal Path of the methodology. They will work concurrently and in tandem with each other.

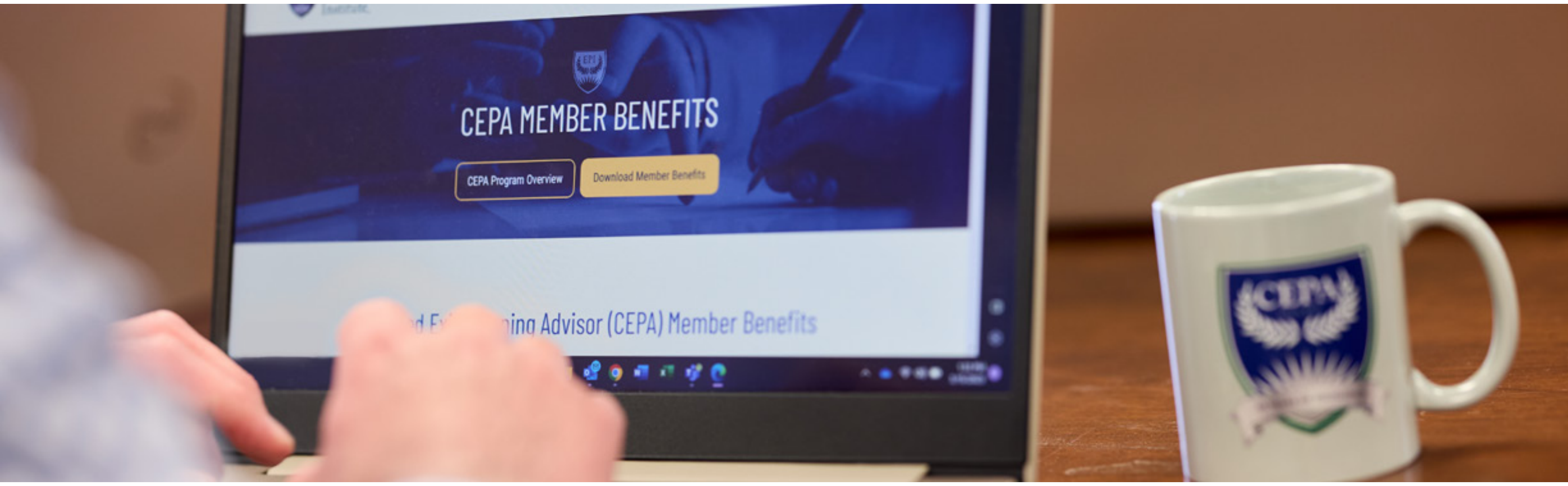
Your journey will likely be longer than the others as you will need to decide how this fits into your existing service lines of your practice. You will also need to decide how you adopt the methodology into what you currently do. You will need a deep understanding of the methodology as well as value growth and exit options the business owner has. You will be an educator to the business owner and will also need to develop key relationships with fellow CEPAs to support the owners value growth journey.

Activities for advancement will come in the Expertise and Growth stage of the Beyond CEPA Path. This CEPA must embrace the core competencies of the other two CEPA paths. Integrating a software tool that powers the Value Acceleration Methodology will be critical for your offerings. Positioning and branding yourself as a Value Advisor within the EPI Community will be a key business development focus, and an advanced understanding of how to grow value within a company will be key.

At the end of your 120-day journey in setting your foundation as a newly minted CEPA, we will revisit this question of, what role do you want to play? The answer will be important to the remainder of your journey as a CEPA and is the key deliverable to move from the Foundation and Implementation Phase to the Integration Phase.

CHAPTER 5: UTILIZING EPI RESOURCES

As a CEPA you have access to tools, content, courses, partners, and providers. Navigating this robust and diverse set of resources can be intimidating for the newly minted CEPA. These resources are broken down into two major groupings: your Member Center and your Partner and Provider Network. Each will come into play along your Beyond CEPA Path and you will begin to use each regularly.



The Member Center

As a CEPA, you have two types of memberships: the standard Credential and Credential Plus. Each membership has a variety of benefits. The Credential Only grants the CEPA an annual license to utilize the CEPA as well as EPI marketing tools, logos, and affiliation to Exit Planning Institute. Credential Plus embraces all the benefits of Credential Only but dives much deeper into the use of a variety of content, tools, and other resources. In your Beyond CEPA Path's Foundation and Implementation Phase, your EPI Account Manager will walk you through your Member Center and its resources. It is recommended you take the time to do this with your EPI Account Manager so you can learn best practices and how best-in-class CEPAs deploy the resources apart of this portal.

After reviewing your Member Center in depth, you can utilize the content provided in your Credential Plus Membership as a CEPA to accomplish best-in-class CEPA characteristic number one from Chapter 4 of this 120-Day Playbook: Mastering VAM Language. It is recommended that you build a knowledge center on your website so that people from business owners to fellow advisors looking to partner with you can come in and learn more about exit strategy. This allows you to become seen as a thought leader within the space. Much of your Member Center content, from research to whitepapers to infographics can be taken and white labeled on your website. Much of the content, as well, can be placed on your social media platforms, such as LinkedIn, or in your blogs. Lastly, there are several sales tools inside of the Member Center from pitch decks and educational presentations, workshop tools, and conversation starters for business owners. All at your fingertips as long as you maintain your annual Credential Plus membership.

Partner and Provider Network

The Exit Planning Institute reviews, audits, and endorses several partners and providers that supply CEPAs with software tools to help power the Value Acceleration Methodology, deep dive education in specialized fields, resources to advance and grow your practice and brand for business owners, and functional advisory team members who help drive value and align business owners' business, personal and financial goals. It is important to know how and when to bring in each one of these partners or providers through your time with the owner.

Partners are those who have gone through a robust vetting process with EPI and have chosen to intentionally integrate themselves into the CEPA Community. These organizations and the people who are within them want to work with you as a CEPA on a deeper level. They are committed, long term, to the overarching EPI Community and the profession thus becoming very integrated with the EPI Community and working very closely with EPI to evolve their service or product.

Providers offer the same variety of services or products to the community and share a similar passion to work with CEPA to help enhance the CEPAs practice or approach. The major difference between the Partners and Providers is their engagement level and strategic relationship with the community and the Exit Planning Institute.

All Partners and Providers can be found on the EPI website, and some can be viewed additional in your materials apart of your Beyond CEPA welcome box you should have received upon successful completion of the CEPA exam. Your EPI Account Manager can shed additional insights into this network and make direct introductions for you to the representatives at the partners and providers. It is recommended that the newly minted CEPA spend time with these partners and providers so they can better understand how to lean into the network and deploy the resources they have.

THE EXIT PLANNING SUMMIT

The Exit Planning Summit is the coming together of the exit planning community. The best advisors from around the world collaborate with their supporting partners and colleagues that are all helping business owners to create more significant companies. Advisors will leave the Exit Planning Summit not only galvanized to accelerate their practice but with the tools and connections to do so.

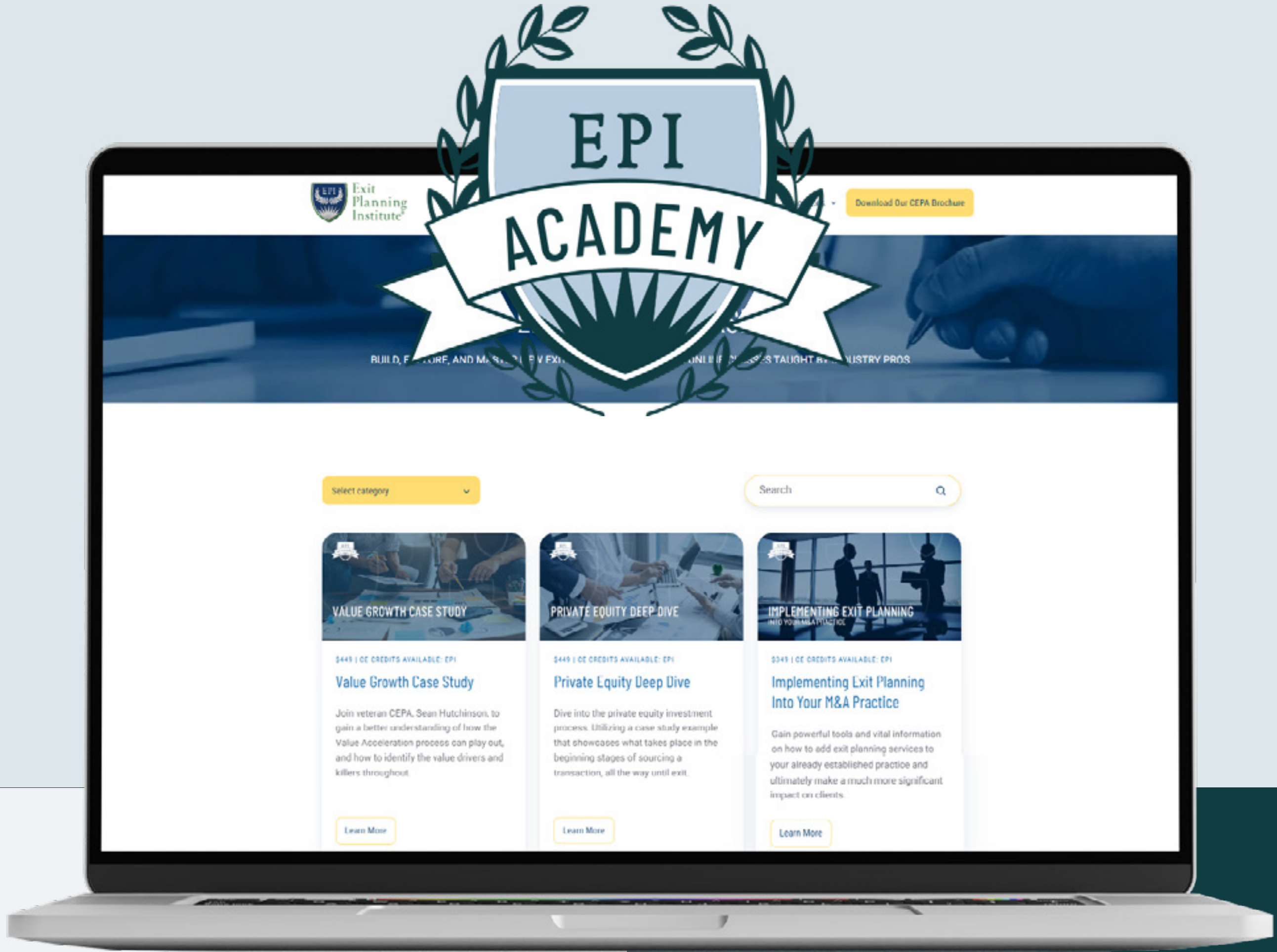
TO LEARN MORE VISIT
ExitPlanningSummit.com Or Scan QR Code

EPI CHAPTER NETWORK

The EPI Chapter Network has over 30 chapters across the United States. These chapters host monthly educational networking events for advisors and business owners and create a forum to collaborate and address their community's unique needs. The EPI Chapter Network creates, encourages, and fosters the adoption of best practices for the exit planning profession and promotes the common business interests of those business advisors engaged in the profession.

EXPLORE AND FIND YOUR EPI CHAPTER AT:

EPIChapters.com



EPI Academy Courses are **segmented into five categories**. Advisors can complete courses across all categories for a breadth of knowledge into exit planning strategies and practice enhancements, or explore all courses within a specific category for a more focused approach.

1. **UNDERSTANDING EXIT PLANNING**
2. **BUSINESS VALUATION**
3. **PRACTICE MANAGEMENT**
4. **BUSINESS DEVELOPMENT**
5. **EXIT STRATEGY**

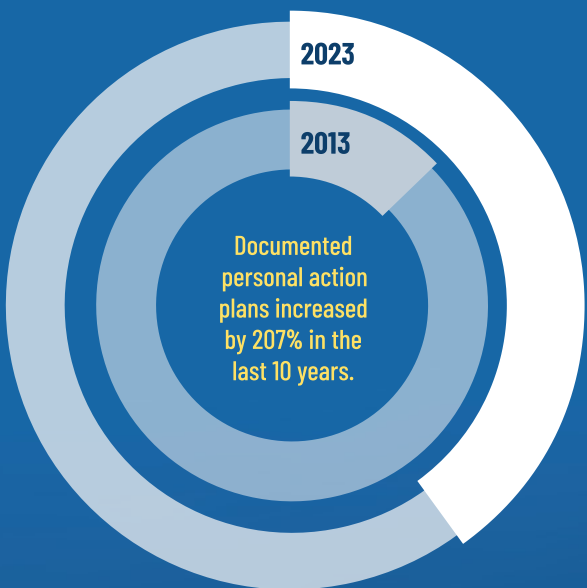
“EPI Academy is continued professional development in a convenient way. It allows advisors a way to build and advance their own practice by completing courses at their own pace online.”

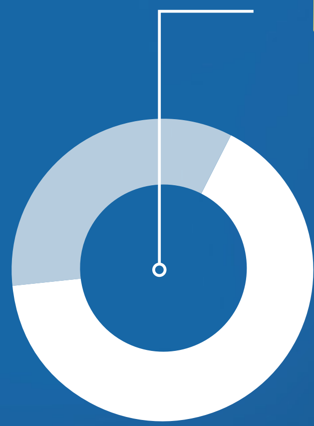
SCOTT SNIDER
PRESIDENT, EXIT PLANNING INSTITUTE

LEARN MORE ABOUT OUR EPI ACADEMY COURSES AT:

EPIAcademyCourses.com

After over 10 years of Regional State of Owner Readiness research, this National data shows the impact of a strong transition strategy.

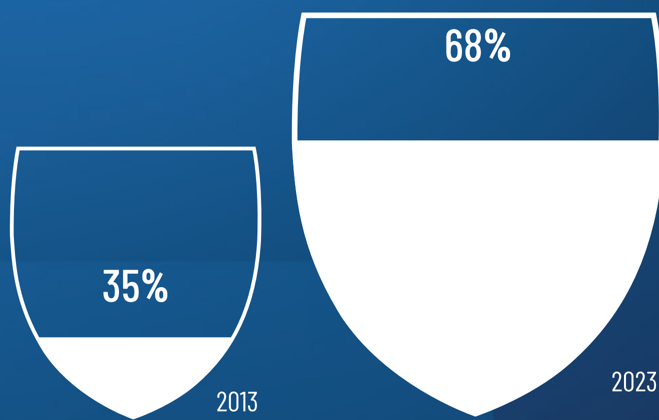




70%

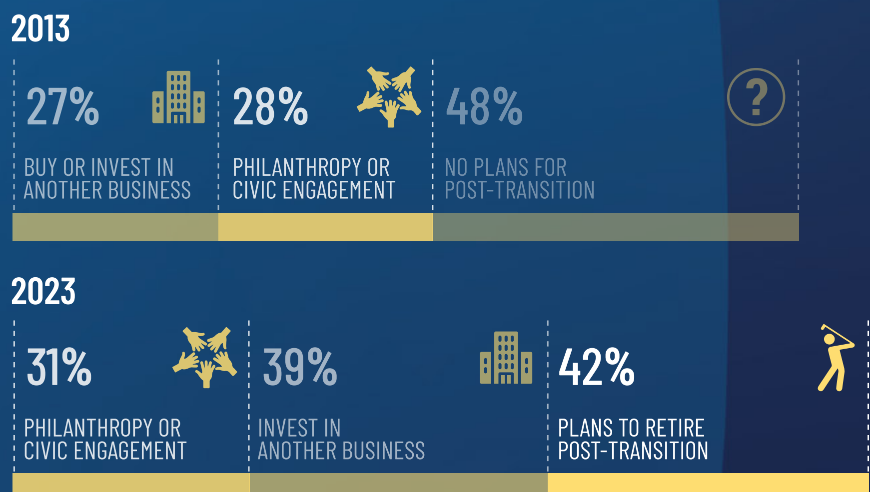
of business owners in the US are familiar with their exit options.

Percent of owners with formal education planning



Business Owners' Post-Transition Plans

The 2023 business owner respondents were asked, "what do you plan to do post-transition?" Though the passion for entrepreneurship is dominant for the 2023 business owner respondents, retirement was the number one answer for what this group will do post-transition.



2023 NATIONAL STATE OF OWNER READINESS REPORT

As we celebrate the 10-year anniversary of the groundbreaking research study, the State of Owner Readiness Report how do today's owners stack up against a decade ago? Delve into the latest insights, assessing business attractiveness and owner readiness on a national scale.

Explore how readiness, paired with business attractiveness, significantly amplifies transition success. Uncover crucial findings indicating that prepared owners not only achieve **SUCCESSFUL** exits but **SIGNIFICANT** ones.

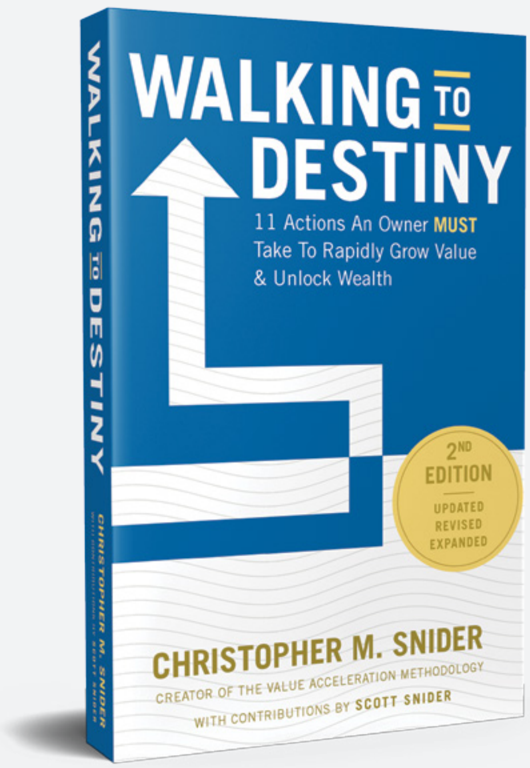
HOW READY ARE BUSINESS OWNERS? FIND OUT NOW!

OwnerReadiness.com

WALKING TO DESTINY

11 Actions An Owner **MUST** Take To Rapidly Grow Value & Unlock Wealth

CHRISTOPHER M. SNIDER, CEPA



Walking to Destiny will position you to build and preserve family wealth for generations.

Veteran entrepreneur and CEO of the Exit Planning Institute, Christopher Snider, brought forty years of experience in corporate finance and leadership to his five-star rated 2016 edition of ***Walking to Destiny***. In this revised, updated, and expanded edition, he brings even more depth to his paradigm-changing work.

ORDER YOUR COPY AT:

WalkingtoDestiny.com

TOPICS COVERED INCLUDE:

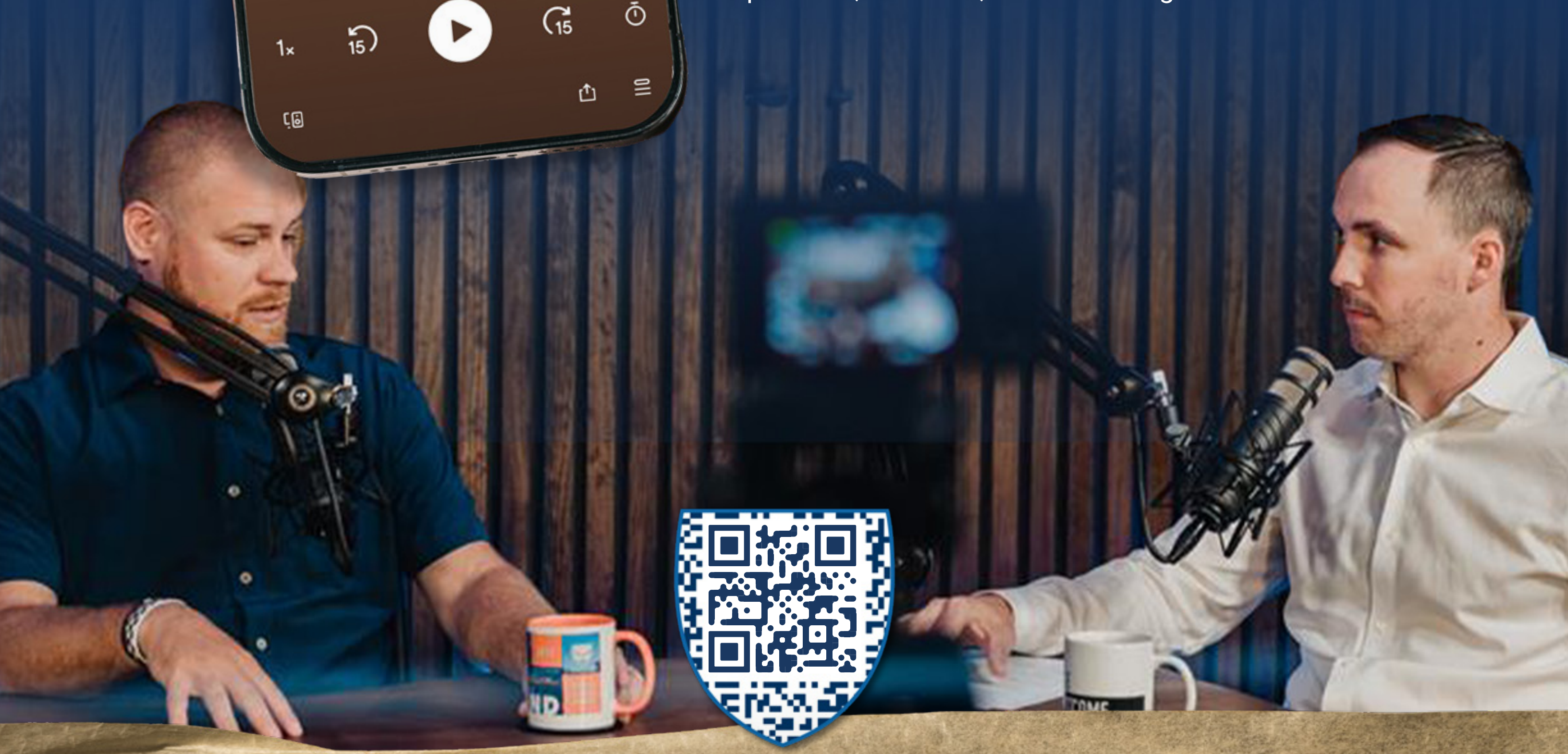
Exit Planning | Valuation | Finance | Business Development

EXIT IS NOW™

PLAN ACCORDINGLY *with Scott Snider*

Join Scott Snider, President of the Exit Planning Institute® and lifelong entrepreneur, as he welcomes business owners and their expert advisors to discuss how they build significant value in their businesses through Value Acceleration.

Exit Is Now will explore how to grow value in your business and personal life by aligning your personal, business, and financial goals.



LEARN MORE AT **ExitIsNow.com**

EXIT PLANNING CONTENT

Exit Planning Institute provides advisors and business owners with free educational content and resources to improve their knowledge on various exit planning topics to utilize with their business owner clients.

Webinars

Exit Planning Institute offers in-depth webinars with industry experts on a wide assortment of topics. Our current webinar series' help professionals Become a Holistic Advisor, Implement Exit Planning, and Educate Business Owners.

LEARN MORE ABOUT OUR UPCOMING WEBINARS AT

EPIWebinars.com

Blog

Exit Planning Institute shares weekly blogs for professional advisors and middle market business owners to keep up-to-date with exit planning, succession planning, advisory team roles, industry trends, unique specialty insights, and useful content.

READ OUR LATEST ARTICLES AT

ExitPlanningBlog.com

5-4-3-2-1: Five Things Every Business Owner Must Know About Exit Planning

CEPA Think Tanks

Join our bi-weekly virtual best practices and networking groups, hosted by the EPI Member Experience team. Think Tanks introduce CEPAs to new topics, integrating best practices through deep conversations with global peers. Each session earns 1 hour of CEPA Continued Education Credit, a member-exclusive benefit.

LEARN MORE ABOUT UPCOMING CEPA THINK TANKS

CEPAThinkTanks.com

Deep Dive Content

Exit Planning Institute shares new content quarterly on trending exit planning topics. This gives advisors and owners a deep dive into the value acceleration methodology. Through whitepapers, case studies, and infographics, advance your education and stay up to date with industry trends.

EXPLORE OUR CONTENT AT

EPIContentLibrary.com

The process of growing a significant company takes time and can be complex. This whitepaper from Exit Planning Institute takes the Value Acceleration Methodology and breaks it into 5 easy concepts as we introduced as 5-4-3-2-1. Though easy to understand as a business owner you may be sitting here still wondering “how do I implement this?”

DOWNLOAD THE WHITEPAPER AT

EPIContentLibrary.com

NOTES

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