



YOUR INVITE TO THE TELL-ALL LUNCH & LEARN

EXIT PLANNING 360°

THURS, NOVEMBER 21, 2019

For Southern California's most trusted advisors and business leaders

Exit planning is exploding. The buzz gains momentum each day as thousands of advisors from all disciplines secure their seat at the business owner's transition table. You are aware but you haven't made your mind up yet. Is exit planning *the right move* for my firm? Do I have the skills and expertise I need to offer exit advice? Is exit strategy the *exactly right solution* for my client retention? **Get the full 360-perspective on November 21.**

WHO SHOULD ATTEND EXIT PLANNING 360°?

If you are a professional or financial services advisor (especially CPAs, wealth managers, commercial bankers, and attorneys) who works with business owners, this **full disclosure, exclusive event** was designed to answer your questions. If you have ever wondered if exit planning is right for you and your firm, **RSVP for this quickly-approaching Exit Planning 360° Lunch & Learn** and walk away with a crystal clear perspective after experiencing the wildly informative lineup (while enjoying lively networking over lunch):

CEO Outlook Panel Discussion: Success Stories and Cautionary Tales from Business Owners in Transition (12:00 PM)

The top-rated "Owners-Tell-All" panel discussion moderated by the locally-headquartered, nationally-recognized exit & succession planning experts of The Founder's Group

CEPA FAQs: More Than a Credential (12:45 PM)

Learn the Value Acceleration Methodology and how CEPA drives value (and results) in your firm immediately

CEPA Table Talk: Best Practices from the Field (1:00 PM)

Want to know how to successfully incorporate exit planning into your firm and drive major results? Hear from an interdisciplinary panel as they dispel the myths and disclose the "do's and don't's" you'll be glad to know before you launch your exit planning efforts and/or marketing strategy.



LIMITED TO 100 ATTENDEES

Event Details: Thu, Nov 21 from 11:30am - 2pm (lunch served)
Estancia Hotel & Spa; 9700 N Torrey Pines Rd, La Jolla, CA 92037

RSVP NOW AT EXITPLANNING360.COM

- or give EPI Headquarters a call at (216) 712-4244 -