Exit Planning Institute®

The Certified Exit Planning Advisor (CEPA®) Credentialing Program

BECOME THE MOST VALUED ADVISOR

More than a credentialing program, a community.

THE VALUE OF CEPA

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

THE AUTHORITY IN EXIT PLANNING

Founded in

2005

The Exit Planning Institute has educated professional advisors for over 18 years

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.

5,000+ Certified Exit Planning Advisors

Includes a network of exit planning professionals from over

18 COUNTRIES

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

Learn more about upcoming Exit Planning Institute programs to join this exceptional Community.

MOST WIDELY ACCEPTED AND ENDORSED EXIT PLANNING CREDENTIAL

The Certified Exit Planning Advisor (CEPA) Credentialing Program is the only program of its kind. Developed by nationally recognized experts in the field of exit planning and value acceleration, the CEPA program is a week-long executive MBA-style program that includes 16 modules taught by 11 expert instructors. Participants who complete the CEPA program and pass the closed book proctored exam, receive the CEPA credential. This program offers professional advisors an innovative learning experience, performance-enhancing resources, and strategic tools to help them advance their practice.

As an education company dedicated to bringing you the best content and training in the industry, Exit Planning Institute strives to deliver an unmatched experience that will "supercharge your practice" and give you a competitive edge in a changing marketplace. Join the CEPA community to experience the impact of our best-in-class education, ongoing practice support, and robust local, national, and global network.

"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

"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

"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

"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

"In one word? POWERFUL"

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

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

Day 2: Understanding & Managing Value

- **Module 5:** Introduction to the Triggering Event
- **Module 6:** Basics of Business Valuation
- **Module 7:** Value Enhancement Process

Day 3: Engagement, Fulfillment, & Rhythm

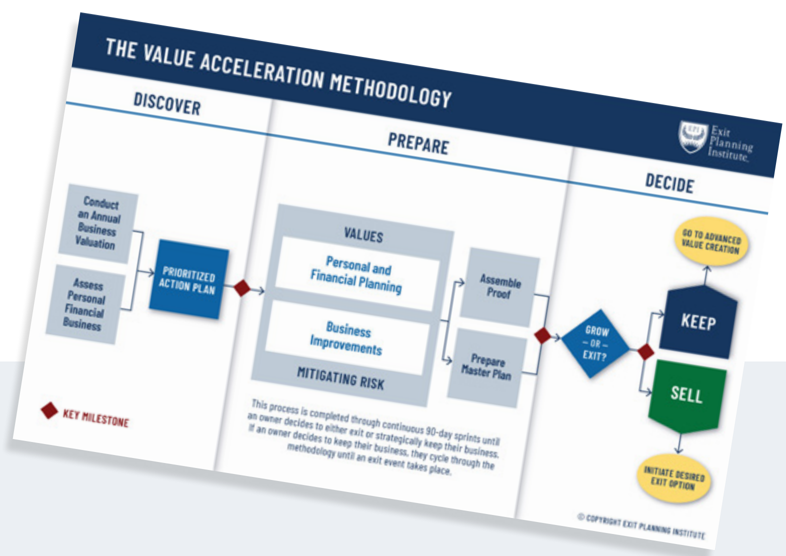
- **Module 8:** Goals and Objectives
- **Module 9:** Creating Action Plans
- **Module 10:** Delivering Action Plans

Day 4: External Exit Options

- **Module 11:** Exit Options Analysis
- **Module 12:** Understanding Private Equity
- **Module 13:** Third-Party Sales and the M&A Process

Day 5: Internal Exit Options

- **Module 14:** Understanding Family Transitions
- **Module 15:** ESOPs as an Exit Strategy
- **Module 16:** Importance of Teams



The Value Acceleration Methodology™ is your strategic framework for executing an exit strategy as a holistic advisor. This methodology, created by Exit Planning Institute CEO Christopher Snider, integrates exit strategy into business, personal, and financial goals of the business owner.

Throughout your CEPA training you will learn the three major components of exit planning, referred to as Master Planning or the “Three Legs of the Stool.” Maximizing Business Value, Personal Financial Planning, and Life After Business Planning.

Exit planning is laser-focused on what you can do right now to grow the value of the business and drive income.

Forget the future. Focus on today.

It is about building, harvesting, and preserving family wealth for generations to come.

ONE WEEK. 16 MODULES.
THE CEPA EXPERIENCE.

PROGRAM DETAILS

COST:

$3,300

SCHEDULE:

5 Days

(6 hours per day)

Live faculty meet up calls daily

Up to **19.5** CPE Hours and **14.5** CFP Credits.

All other continuing education credits must be self submitted.

PLATFORM:

Online through EPI Academy

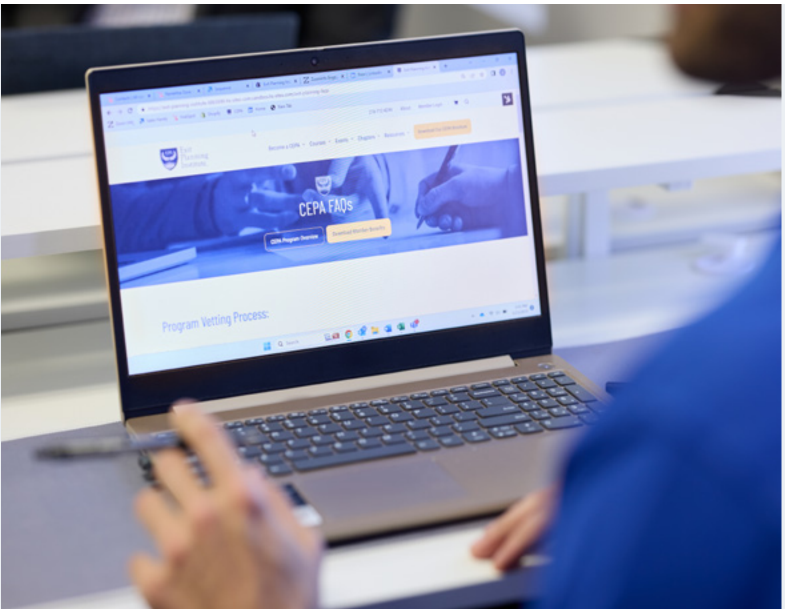
CEPA REGISTRATION INCLUDES:

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

PROFESSIONAL EXPERIENCE AND EDUCATION REQUIREMENTS

Five years or more, full-time or equivalent, experience working directly as either a professional advisor, former/current business owner, or similar capacity. Bachelor's degree or equivalent from a qualifying institution.

Note: Applicants without a qualifying degree must submit additional professional work 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 pass their exam with ease, 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: $395

PROGRAM DATES:

2024	2025
~~January 22-26~~	January 27 - 31
~~February 12-16~~	February 24 - 28
~~March 18-22~~	March 24 - 28
~~April 15-19~~	April 21 - 25
~~May 13-17~~	May 19 - 23
~~June 10-14~~	June 23 - 27
~~July 15-19~~	July 21 - 25
~~August 19-23~~	August 18 - 22
September 16-20	September 22 - 26
October 21-25	October 20 - 24
November 18-22	November 17 - 21

Register for your program today at

EarnCEPA.com

CEPA TIMELINE

Step 1: Select Your Program & Enhancements

Select and register for an upcoming CEPA Program that fits your schedule. When you register, you can view supplemental programs that enhance your CEPA experience and provide discounts when bundled.

Step 2: Receive Personalized Onboarding

Before you attend your selected CEPA program, you will receive a personalized onboarding program with your EPI Member Experience Representative. During onboarding you will attend a Pre-CEPA Webinar, schedule your exam slot, update your information for your personalized Find-A-CEPA page, and complete all required reading.

Step 3: Attend the CEPA Program

The 5-day program immerses you within a three-layered learning approach. Each morning, you will enter the first layer and begin your CEPA program by completing that specific day's video modules. The second layer begins in the afternoon with independent self-study exercises. The third layer and each day concludes with attending the faculty meet up calls to hear from the instructors and ask any questions.

Step 4: Study & Take the Exam

After attending CEPA, read the exam instructions and review course notes. The CEPA exam is administered virtually with a live online proctor. You will be required to take the exam within five days of completing the training. Once you've passed the exam, you will have officially earned the Certified Exit Planning Advisor credential.

Step 5: Explore Beyond CEPA

Prepare yourself for success after earning your new credential during a one-hour call with EPI's President and 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!

HISTORY OF EPI

2005

Formation of Exit Planning Institute

Launched by Peter Christman and Richard Jackim, EPI aimed to provide the exit planning tools and resources advisors needed.

2007

Launching the CEPA® Credentialing Program

To expose advisors to the diverse disciplines that contribute to an effective exit plan and the execution tools needed. The Certified Exit Planning Advisor (CEPA®) Credentialing program launched at the University of Chicago.

2011

Creation of the EPI Chapter Network

To spread exit planning awareness and best practices, Christopher Snider launched the first EPI Chapter in Northeast Ohio. Today, the EPI Chapter Network is comprised of local advisors dedicated to changing the outcome for owners.

2011

The First Exit Planning Summit

Representing the growth of the exit planning community, the first inaugural Exit Planning Summit was held in Fort Lauderdale to bring together CEPAs and professional advisors.

2012

Snider Premier Growth Acquires EPI

Combining their vast experience in rapidly growing business value and their shared passion for educating and helping business owners, Christopher and Scott Snider purchased EPI.

2013

The Value Acceleration Methodology ™ Reframes "Exit Planning"

Recognizing the need for a universal methodology and exit planning language, Christopher Snider developed the Value Acceleration Methodology, which focuses on creating transferable business value today, rather than solely on exit or sale.

2013

Understanding the National State of Owner Readiness™

To better serve and understand the transitioning owner market, EPI conducted the first research report on business attractiveness and owner readiness, which measured crucial data on a local, regional, and national scale.

2016

Publishing *Walking to Destiny*

Christopher Snider published *Walking to Destiny: 11 Actions an Owner Must Take to Rapidly Grow Value and Unlock Wealth*, the official exit planning and value acceleration book, to arm owners and advisors with the knowledge needed to recognize their value potential, execute growth tactics, and harvest wealth locked inside their business.

2020

EPI Goes Virtual - First CEPA Online

After solely providing in person education, EPI pivoted the CEPA credentialing program to a state-of-the-art virtual offering which completely transformed the way we educated advisors.

2021

Scott Snider Named President

On the ninth anniversary of the Snider's acquisition of EPI, Scott Snider was named President.

2022

The Next Education Advancement: EPI Academy Launches

After the success of the CEPA Online program and with growing demand for further exit planning education, we launched EPI Academy, an interactive and now award-winning online learning platform.

2023

Releasing The Second Edition of *Walking to Destiny*

Christopher Snider released the revised second edition of *Walking to Destiny* which includes insights about the Value Acceleration Methodology and analyzes the exit planning industry developments.

Exit Planning Institute®

CEPA
Certified Exit Planning Advisor®

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