

CHAPTER LAUNCH PROCESS

WHAT IS THE PURPOSE OF EPI CHAPTERS?

The EPI Chapter Network creates a forum where the local community of professional advisors can collaborate and address the unique needs of their community. Chapters develop educational programs for business owners and professional advisors that build awareness and better prepare an owner for the successful exit of their business. The purpose of the EPI Chapter Network is to create, encourage, and foster the adoption of best practices in the exit planning profession. Chapters promote the common business interests of business advisors engaged in exit planning. The EPI Chapter Network is comprised of a group of local advisors dedicated to changing the outcome for middle market owners looking to grow, transition, or exit their businesses.

HOW DO I KNOW IF LAUNCHING A CHAPTER IS RIGHT FOR ME?

EPI Chapter Presidents are industry thought leaders. It takes a dedicated leadership team to ensure a new chapter not only succeeds, but thrives. If you have a passion for building significant companies, establishing an EPI Chapter gives you the chance to make your mark in your community.

WHAT IS THE PROCESS FOR LAUNCHING AN EPI CHAPTER?

- Step 1.** Visit www.EPIChapterPresident.com and submit the Chapter Launch Application.
- Step 2.** Once submitted, your application will be reviewed by the EPI team.
- Step 3.** If approved, you will then begin the launch process by selecting your launch day.
- Step 4.** Pay the Annual Chapter License fee of \$10,000. This fee can be generated through sponsorships or registration costs. This fee can be split by the Chapter Leadership Team if needed. The Management fee must be paid at least 14 weeks prior to your selected launch date or you are subject to rescheduling or cancellation.
- Step 5.** Submit all assets to EPI 14 weeks prior to launch.
 - == Assets include: all leadership team bios and headshots, as well as all sponsor logos and information.
- Step 6.** Submit three completed future meeting templates for review and CE approval 12 weeks prior to launch.
 - == Upload all chapter event information to EPIChapterLeadership.com.
- Step 7.** Submit the venue contract information for your chapter launch event 8 weeks prior to launch.
 - == Include all venue information for your first 12 months of events.
- Step 8.** Chapter Leadership team must provide their invitee list to EPI 10 weeks prior to launch. This list must be submitted to the EPI Community Coordinator in excel with a minimum of 300 local advisor and/or business owner contacts.
- Step 9.** The EPI marketing campaign begins 6 weeks prior to launch and your new chapter website is published.
 - == During this time, we also recommend personal outreach to your network.
- Step 10.** On your Chapter Launch day, an Exit Planning Institute staff and/or faculty member will deliver a keynote speech to officially launch the chapter and present a standard chapter launch presentation.
- Step 11.** The support does not end on launch day. EPI provides bi-monthly President's circle calls and bi-monthly chapter support calls. More chapter support information is listed below.

WHAT SUPPORT OR BENEFITS DOES EPI OFFER TO CHAPTERS?

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Annual Meeting Curriculum

EPI has taken some of the best aspects from successful chapters and events over the years and rolled it into an extensive curriculum to ensure chapters across the globe experience the same transformational information with their local flair. Standardizing the Chapter curriculum also allows for uniform education surrounding a successful exit.

- == 4 months: best practice case study work.
- == 3 months: meetings based on the Chapter Leadership Team's choice.
 - == We recommend these meetings support trending topics in your region.
 - == Chapter leadership teams are provided with a database of 2019, 2020, and 2021 meeting templates for reference or inspiration.
- == 1 month: A keynote speaker style event.
- == 2 months: social events where the chapter can partner with local organizations of their choice.
- == 2 months off: EPI recommends one Summer month and one winter month.

Marketing Support

- == Digital banners, templates, images, and other graphics for each meeting.
- == Dedicated email campaign per meeting.
- == Social media platform management by EPI.
- == Chapter landing page on EPI website.
- == Chapter Presidents featured in national and regional campaigns.

Logistical Support

- == Registration and reporting on a weekly, quarterly and annual basis.
- == Cash flow management and reporting.
- == Continuing Education management and reporting.
- == Credit card processing and fees.

Special Project Support

- == Each year the Chapter will produce a special project. These initiatives will drive awareness and chapter attendance. These projects could include research, whitepapers, or short e-books produced by the leadership team and other local contributors. This project will be managed by EPI.

Community Coordinator

- == The EPI Chapter network has a 100% dedicated EPI staff member who will manage the entire chapter network, support their needs, manage all marketing and logistics, and support special projects.

Think launching a chapter may be right for you? Visit www.EPIChapterPresident.com to fill out the application or reach out to our Community Coordinator, Jenna Meredith, at JMMeredith@exit-planning-institute.org with any questions.