



CEPA[®]
Certified Exit Planning Advisor

Certified Exit Planning Advisor (CEPA[®])

What is EPI[®]?

The Exit Planning Institute (EPI) is an education company, powered by a dedicated staff, industry experts, and market leaders, that are passionate about providing top professional advisors the best industry content, ongoing practice support, and owner education resources. From humble beginnings, EPI has grown to become the exit planning market leader while staying focused and true to their mission. They are an education company that certifies and supports more than 800 CEPAs (and counting) as well as thousands of advisors worldwide through national, regional, chapter, and virtual education. EPI is now available in 15 countries and 44 states.

What is a CEPA?

In 2007, EPI released and host the first **Certified Exit Planning Advisor[®] (CEPA[®])** credentialing program. The curriculum followed the principles found in “The \$10 Trillion Opportunity” and was designed to educate professional advisors who worked with business owners on the specific process for exit planning. The course exposed advisors to the diverse set of disciplines that contribute to an effective exit plan and the tools needed to execute the work. The CEPA program was a success and it began to be offered twice per year at the University of Chicago, Booth School of Business.

Today, the Certified Exit Planning Advisor (CEPA) Program is a five-day executive MBA-style program that trains and certifies qualified professional advisors in the field of exit planning. Developed and taught by a diverse team of over 15 nationally-recognized experts, the CEPA program offers attendees an innovative learning experience, performance-enhancing resources, and the strategic insights and tools to help them advance their practice in a transitioning marketplace. The CEPA Program has expanded to six training centers across the United States.

In addition, EPI now offers 7-10 webinars and virtual training options every month on exit planning-centric and industry relevant topics to help advisors stay current and educated on

present trends, knowledge, and updates (while in some cases earning CE credits for limited to no cost). EPI's virtual education serves more than 350 advisors every month and is available to the entire industry.

How can a CEPA help me?

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, his/her family, and the business itself are addressed by exit planning through creating value today.

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 his/her terms when they are ready. It aligns the business, personal, and financial needs of the owner. Certified Exit Planning Advisors (CEPA) educate the owner on all of the exit options and enters an engagement with an exit-option-agnostic perspective as to truly serve the business owner's diverse needs. CEPAs collaborate with a seasoned, multi-disciplinary team of professionals to support the success of the business owner and use each other's specialties and expertise to the benefit of the project.

FocusCFO Associates with the CEPA Designation:

Tom Bartos
Forest Bookman
David Bourke
Darren Cherry
Mark Clower
Kim Cooper
Mike Derringer
Jeff Farrington
Randy Feger
Kathleen Ferry
Tom Flynn
Greg Gens
Jim Gilbride
David Green
Brad Martyn
Lesli Matukaitis
Bob Palmerton
Mark Rust
Jeff Semple
Michael Stier