Two (2) Day Exit Planning Course
16 CPE Credits
Delivered via Webinar
Thursday, June 11th & Friday June 12th
10:00am est to 5:00pm est
(10 minute breaks at the top of each hour, 30 minute lunch break at 1:00est)

This special program is being shared with you because you, or someone that you have a networking relationship with, is a Member of the International Growth and Exit Planning Association, LLC.

This presentation has not been offered in a two (2) day format such as this for six (6) years. However, because COVID-19 has prevented us all from networking and learning face-to-face, we decided to host this event to:

1. Provide education on strategic exit planning, much of which is anticipated to be in high demand post-coronavirus economic malaise
2. Provide CPE credits, through a proven program (12 years approved by NASBA for CPE)
3. Allow the Members of the International Growth and Exit Planning Association to share this special benefit with existing or desired referral partners. While we cannot meet face-to-face, we can still educate the marketplace on exit planning and have the marketplace better understand the level of training that our Certified Business Exit Consultants hold.

Course Details

- Two-Day Course earns a full 16 hours of NASBA-approved Distance Learning CPE
- Delivered via Live Web Broadcast led by John Leonetti, Esq., M.S. Finance, CM&AA, Certified Business Exit Consultant (program founder and leader)
- Member Service: participants only pay a $99 processing fee

What you will learn:

- This course is designed for Certified Public Accountants and their COIs
- Participants will learn about helping clients with planning services around the largest financial and emotional transaction of business owners' lives --the sale / transfer of their privately-owned business
- Learn the core concepts around exit planning, which is a specialized strategic planning service for business-owning clients; these concepts will help CPAs and their professional networks collaborate to better serve the business owner market
- Learn how to successfully start the business exit planning conversation and how to collaborate with Members of the IGEPA to bring highly-trained, experienced resources to your business owner clients.

Click here to Register Now

Course Description

This course will explore business exit planning as applicable to professional advisors, including the exit planning process. Join John Leonetti, author of *Exiting Your Business, Protecting Your Wealth* as he discusses characteristics of business owners relevant to exit planning. The course will also explore tools and techniques, emerging control practices, and the implications for accounting and financial institutions.

Course Subject Modules, approximately 1 Hour per Subject

1. Welcome & An Overview of The Marketplace for Exiting Owners
2. Exit Goals of the Business Owner
3. Mental and Financial Readiness for an Exit
4. The Four Types of Exiting Owners
5. Valuations for each Exit Option & Why They Vary
6. The Five Major Transaction Options
7. External Transfers: Selling a Business: The M&A Process and Private Equity
8. Internal Transfers: Employee Stock Ownership Plans (ESOPs), MBOs and Gifting
9. Deal Structuring & Taxes
10. Estate Tax and Legal Agreements
11. Service Providers & The Advisory Team
12. Pulling it All Together

We will discuss what the exit planning industry looks like, provide an overview of recent transactions and what buyers are looking for in Value, Value Gap & Taxes. An overlooked part of the process is the coordination of the personal and business needs of the business owner. A team approach provides a more valuable and successful outcome for the business owner.

Participants will also learn how to:

- Recognize characteristics of business owners who would benefit from an exit plan
- Identify key factors in establishing a viable exit option
- Identify tools and techniques used in exit planning
- Learn how to identify clients' in need of exit planning assistance

- Begin the exit planning conversation with our proprietary Business Exit Readiness Index survey tools (available through the IGEPA Member who referred you to this program).

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CPE Details
Participants will earn 16 CPE credits

To qualify for CPE, the attendee must demonstrate attendance throughout the course by participating in periodic online polling. Within 5 business days of the conclusion of the course, qualifying students will be emailed their CPE certificates.

Additional Information:

- Prerequisites: None
- Who Should Attend: this course is suggested for all professional advisors with business-owning clients
- Advanced Preparation: None
- Delivery Method: Group Live Broadcast
- Refunds and Cancellations: For more information regarding refund, complaint, and/or program cancellation policies please contact our offices at 781-821-2608.

Click to Register Now

NASBA CPE Program Details:

The International Growth & Exit Planning Association is affiliated with Pinnacle Equity Solutions, Inc., which is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website:www.nasbaregistry.org.

Please call 781.821.2608 with questions, or email george@theigepa.com

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