The BEI Advanced Exit Planning Series

This Exit Planning Series is the second in a three part professional education process leading to certification from the best-known Exit Planning organization. Completing the Advanced Exit Planning series is critical to providing comprehensive Exit Planning services to the business owning community. The primary goal of the BEI certification program is to provide advisors with information that will serve as a solid foundation for your professional Exit Planning endeavors, whether or not you plan to pursue a designation.

Learning Objectives

Understanding Owner Objectives
After completing this program, course participants will be able to uncover, understand and prioritize client goals and objectives with respect to planning for the future of their business ownership interest.

Quantify Business and Personal Financial Resources
After completing this module, course participants will be able to identify the role of business value and business cash flow in the Exit Planning process. They will also be able to isolate the critical factors or information necessary to determine business value and projected future cash flow of the business.

Maximizing and Protecting Value
Upon completion of this course, students will be able to recognize basic value drivers for privately held businesses, identify the basic features and/or benefits of tax minimization strategies in Exit Planning, and determine the basic uses and structures of key employee incentive planning.

Ownership Transfers to Third Parties
After completing this program, course participants will be able to demonstrate their understanding of the essential elements of the third party sale process for a privately held business. They will also be able to demonstrate awareness of the potential pitfalls and challenges that may be encountered by business owners looking to sell their businesses to third party buyers. Finally, students will be able to accurately identify planning techniques that improve the success of the third party sale process.

Ownership Transfers to Insiders
Upon completion of this course, students will be able to identify critical elements and issues involved in transfers of ownership of closely-held businesses to co-owners, family members and employees and the features of ownership transfer strategies that support a business owner's goal to transfer ownership to an "insider".

Business Continuity
After participating in this course, students will be able to understand and identify planning solutions that support continuity of leadership, ownership and business operations following the death, disability or other continuity event of a business owner.

Personal Wealth and Estate Planning
After completing this course, program participants will be able to identify when to use certain estate planning and personal planning strategies and recommendations, as well as the essential elements of those strategies and recommendations, for the benefit of a business owner client.

Family Business Planning
Students who successfully complete this program will be able to identify process and techniques that support family governance and family communication in a family-owned business. Students will also be able to isolate critical issues in developing a successor and a succession plan in a family-owned business.

Non-Qualified Deferred Compensation
Upon completion of this program, participants will be able to understand and identify fundamental issues addressed through the use of non-qualified deferred compensation. Students will also be able to pinpoint critical elements and structural features of non-qualified deferred compensation as well as legal and tax considerations. Finally, successful students in this program will be able to select appropriate scenarios in which different variations of non-qualified deferred compensation can be used.

Advanced Exit Planning Series

Who Should Attend?: Professional Advisors

Understanding Owner Objectives:
Continuing Professional Education credit hours earned: 4.5
Field of Study (NASBA): Management Advisory Services; Specialized Knowledge and Applications
National Registry of CPE Sponsors ID: 109178
Delivery Method: QAS Self-Study

Pricing:

Non-Member:$1795.00

Member: $1795.00

Quantify Business and Personal Financial Resources:
Continuing Professional Education credit hours earned: 2.5
Field of Study (NASBA): Finance, Specialized Knowledge and Applications
National Registry of CPE Sponsors ID: 109178
Delivery Method: QAS Self-Study

Maximizing and Protecting Value:
Continuing Professional Education credit hours earned: 5.5
Field of Study (NASBA): Taxes, Business Management and Organization, Specialized Knowledge and Applications
National Registry of CPE Sponsors ID: 109178
Delivery Method: QAS Self-Study

Ownership Transfers to Third Parties:
Continuing Professional Education credit hours earned: 5
Field of Study (NASBA): Management Advisory Services; Specialized Knowledge and Applications
National Registry of CPE Sponsors ID: 109178
Delivery Method: QAS Self-Study

Ownership Transfers to Insiders:
Continuing Professional Education credit hours earned: 10
Field of Study (NASBA): Taxes, Specialized Knowledge and Applications, Management Advisory Services, Business Law
National Registry of CPE Sponsors ID: 109178
Delivery Method: QAS Self-Study

Business Continuity:
Continuing Professional Education credit hours earned: 4.5
Field of Study (NASBA): Taxes, Personnel/HR, Business Management and Organization, Business Law, Specialized Knowledge and Applications
National Registry of CPE Sponsors ID: 109178
Delivery Method: QAS Self-Study

Personal Wealth and Estate Planning:
Continuing Professional Education credit hours earned: 3
Field of Study (NASBA): Management Advisory Services, Taxes, Specialized Knowledge and Applications
National Registry of CPE Sponsors ID: 109178
Delivery Method: QAS Self-Study

Family Business Planning:
Continuing Professional Education credit hours earned: 3
Field of Study (NASBA): Business Management and Organization, Specialized Knowledge and Applications
National Registry of CPE Sponsors ID: 109178
Delivery Method: QAS Self-Study

Non-Qualified Deferred Compensation:
Continuing Professional Education credit hours earned: 3
Field of Study (NASBA): Business Law, Taxes, Specialized Knowledge and Applications
National Registry of CPE Sponsors ID: 109178
Delivery Method: QAS Self-Study

Advanced Preparation and Prerequisites
Prerequisites: Completion of BEI Boot Camp live or online training program
Program Level: Advanced

Participants must notify BEI directly to request a refund or cancellation prior to course access. Once the course is accessed refunds are no longer available. For more information regarding program refund policies please contact BEI on weekdays between 8 a.m. and 5 p.m. Mountain time at 888-206-3009.