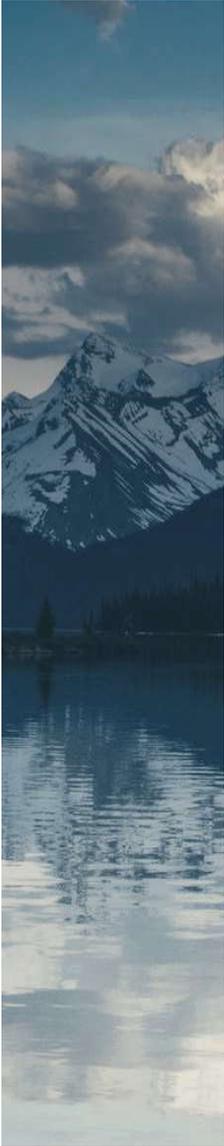


# CBE<sup>C</sup>

CERTIFIED BUSINESS EXIT CONSULTANT® DESIGNATION



# About the CBEC® Course

*Certified Business Exit Consultant®  
Designation*

*Elevating Exit Planning  
Through Integrity, Education,  
and Collaboration*

The CBEC® Designation delivers a combination of training and skills through leading-edge curriculum, top expert instructors and community support.

Learn new skills and techniques to help your business-owning clients meet their personal and professional business goals—from starting the conversation through planning and execution

**Price/Performance Leader:**

The CBEC® is the top value in Exit Planning Programs. We are in our 7<sup>th</sup> year offering 100% remote certification. Over 650 Professional Advisors have successfully completed this course and are now delivering exit planning solutions to their business owning clients.

Approved for continuing education credits from the CFP Board and NASBA, attendees may earn up to 18.5 CPE credit and 17 CFP credit.

\*\* The CBEC® is the only Exit Planning coursework promoted by NACVA.

## *Two-step process: Pre-Work & Certification*

1. **Pre-Work** through self-paced online classes: Learn the core concepts of Exit Planning.
2. **Certification** the CBEC® course is delivered over nine (9) weekly Webinars and culminates with a two-day review followed by the CBEC® exam.

## **CERTIFICATION COURSE CONTENT, BY WEEK:**

### **1. PROGRAM ORIENTATION**

Attendees will introduce themselves and meet classmates. We will discuss the format for the class and review the pre-work content.

### **2. PRIVATE CAPITAL MARKETS / MIDDLE MARKET STRATEGIES**

For our first full curriculum class, we will review the CBEC® PCM online modules and lessons from the text. We will study how much private markets have changed in the past decade and how we can communicate these changes to business-owning clients.

### **3. BUSINESS OWNER MENTAL READINESS & THE VALUE GAP**

This content focuses on the mental and emotional state of owners. We will calculate a Value Gap for our case study to better understand Step 2 in the Pinnacle Process, Financial & Mental Readiness. Taught by faculty who authored books on the topics.

### **4. BUSINESS VALUATION**

We will focus on how to expand our understanding of business valuations. Using our case study, we will discuss different appraisal strategies. The class is taught by faculty who wrote the text from the pre-reading assignments.

### **5. MIDTERM REVIEW & EXAM**

This class reviews and integrates all content covered to date. The review will be followed by a midterm [ungraded] examination that will be administered online to help attendees assess their progress and curriculum retention.

### **6. BUSINESS GROWTH DRIVERS & STRATEGIES**

We want to focus on how owners can grow the value of their businesses to work to close that Value Gap. This class will also expand on The Five Major Transaction Options with a focus on the (1) sale transaction as well as the (2) Private Equity Group Recap. Faculty for this class are the creators of growth software and authors of assigned white papers.

### **7. ESOP & INTERNAL TRANSFERS**

Lessons include the tax inefficiency of internal transfers as well as faculty teachings on unique ways to structure internal transfer to align with owner goals and to be more tax efficient. Class taught by internal transfer experts.

### **8. MANAGEMENT INCENTIVE AND RETENTION & CAPSTONE PRESENTATION**

Our final content class covers the Capstone course material which focuses on pulling together all the concepts taught in the curriculum as well as teaching combination strategies.

### **9. PULLING IT ALL TOGETHER & EXAM PREP: PROCTORED, LIVE WEBINAR**

# About the IEPA

*The International Exit Planning Association*

*Elevating Exit Planning Through Integrity,  
Education, and Collaboration*

The IEPA is a national association of senior-level, professional advisors who deliver high quality, customized solutions to business owners regarding growth and the eventual exit from their privately held businesses. The IEPA is the governing body responsible for establishing and maintaining standards for the CBEC® (Certified Business Exit Consultant®) designation.

Membership in the IEPA provides access to this network through the Referral & Collaboration Portal, our online invitation-only space designed for collaboration.

The IEPA also delivers Continuing Professional Education and Educational Conferences throughout the year. All CBEC® designees must maintain membership in IEPA to sustain their designation and use the CBEC® marks.

## **NOW IN OUR 7<sup>TH</sup> YEAR OFFERING 100% VIRTUAL CERTIFICATION**

*Our mission is to empower advisors to deliver Exit Planning services across the Lower-Middle Market owner marketplace*

*The IEPA vision is to enable Lower-Middle Market Business Owners to protect their wealth and have their business succeed without them.*

## **Why learn Exit Planning from the IEPA?**

**Quality:** Senior level professionals comprise the majority of those accepted into the CBEC® course. The CBEC® has a stellar reputation as a boutique credential that drives growth for our members and their business owner clients.

**Convenience:** All coursework, classes, reviews, and the exam are delivered via webinars including both live and pre-recorded content. Question & Answers sessions allow for interactive participation by attendees.

**Faculty:** You'll learn from Exit Planning Pioneer, John Leonetti, author of *Exiting Your Business, Protecting Your Wealth*, and special guest instructors who are industry-leading subject-matter experts, published authors and recognized thought leaders.

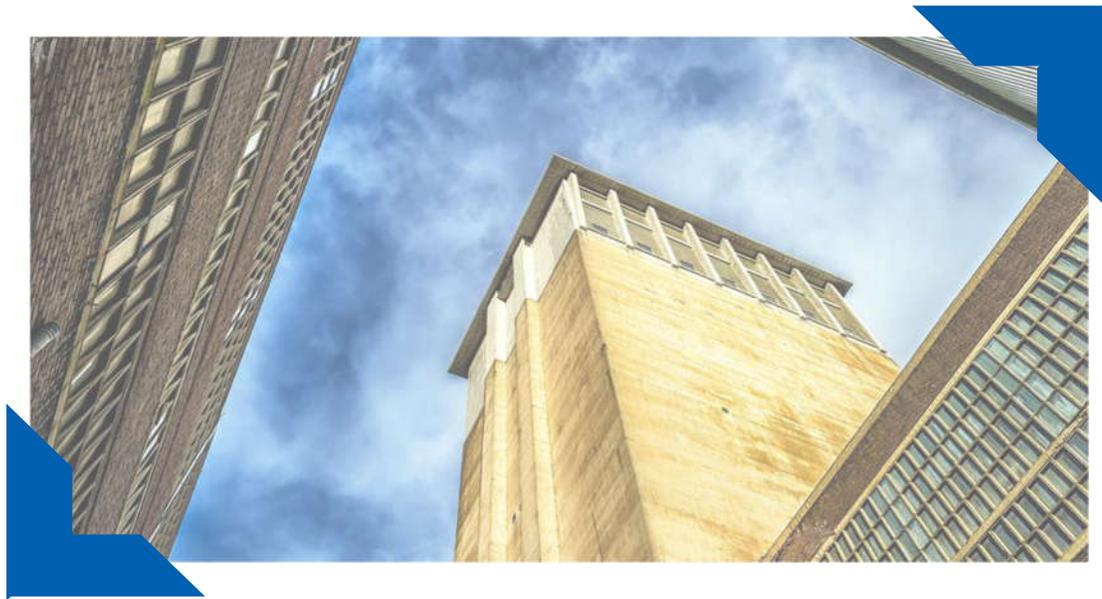
**Limited Class Size:** We have a limited class size to provide individualized support and attention to our students.

**Format:** Our course is designed to enhance your learning experience and conveniently fit a busy schedule. Students are guided through 9-weeks of training (90-minute sessions) and are offered opportunities to network and practice the new skills they are developing.

**Dedicated Learning Center:** The Exit Planning Training Center is a dedicated-use facility in suburban Boston used for broadcasting distance learning webinars and optional live events (subject to COVID restrictions and attendee comfort levels).

**Complete Planning:** the CBEC® is a fully integrated system with engagement & assessment tools, value growth tools, and planning deliverables and related analysis tools.

***We are committed to your success,  
not just your Certification.***



# DESIGNATION DETAILS

Holders of the CBEC® designation may renew annually to remain active and in good standing.

## **Completing the Designation**

CBEC® designation requires that attendees must complete and submit a full exit plan to the IEPA for official review and approval.

## **Continuing Education**

To remain in good standing, all CBEC® designees must complete 10 hours of continuing Education each year to remain in good standing. This does not have to be IEPA credit hours. Proof of CE is submitted through IEPA's online portal.

## **Annual Conference**

The IEPA sponsors 2 open annual conferences in the Spring and Fall. Discounts are available for all IEPA members.

## **Renewal Fee**

The renewal fee of **\$395** is due on the anniversary of your entry into IEPA. Additional membership levels are available.

# COURSE CALENDAR

## 2022 WINTER/SPRING COURSE

Nine (9) webinars 4:00 – 5:30 ET on Wednesday evenings February 16<sup>th</sup> – April 12<sup>th</sup> (Tues)  
Live/Remote review and exam on April 14<sup>th</sup> & 15<sup>th</sup>

### February

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### March

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### April

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## 2022 SPRING/SUMMER COURSE

Nine (9) webinars 4:00 – 5:30 ET on Wednesday evenings May 18<sup>th</sup> – July 19<sup>th</sup> (Tue)  
(No Class the week of July 4<sup>th</sup>)  
Live/Remote review and exam on July 28<sup>th</sup> & 29<sup>th</sup>

### May

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## 2022 FALL/WINTER COURSE

Nine (9) webinars 4:00 – 5:30 ET on Wednesday evenings October 12<sup>th</sup> – Dec 6<sup>th</sup> (Tues)  
(Class the week of Thanksgiving will be held Tuesday Nov. 22<sup>nd</sup>)  
Live remote review and exam on December 8<sup>th</sup> & 9<sup>th</sup>

### October

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### November

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### December

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# NEXT STEPS

APPLY TO BECOME A CBEC® TODAY

<https://theiepa.com/page/CBEC-course-details>

## INTERNATIONAL EXIT PLANNING ASSOCIATION

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<https://theiepa.com>

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