



BEI's Boot Camp for Advisors™ *Online*

In-Depth Exit Planning Training and Invaluable Marketing Information for Successful Business Owner Advisors

With business owners exiting their companies in record numbers, establishing a comprehensive Exit Planning Process should be top of mind for today's business advisors. Boot Camp for Advisors not only helps advisors identify opportunities for growing their business through Exit Planning, but it also provides in-depth training and a proven systematic process for helping clients successfully exit their businesses.

Learning Objectives

In this program, participants will develop an awareness of the breadth and scope of the planning service referred to as "Exit Planning" for business owner clients. More specifically, participants will identify the types of professional advisors who participate in the Exit Planning Process for a typical business owner client and their roles on the Advisor Team. Participants will identify typical business owner objectives, as well as distinguish the role of business value and business cash flow in planning for a future transition of ownership. Participants will also be able to identify the key features of planning techniques that can be applied to maximize and protect business value, successfully transition ownership to either a third party buyer or to an "insider" (family, co-owner, employee), provide for business continuity at an owner's death or disability and prepare a business owner for addressing personal planning issues that arise when dealing with business issues.

Every advisor has the technical skills to assist an owner in Exit Planning, but few know how to package the process and use it to drive demand for their services. Attend an upcoming BEI Boot Camp for Advisors to begin implementing Exit Planning into your practice today and to take advantage of all the opportunities that Exit Planning can offer. Don't miss this opportunity to set yourself apart from the competition.

BEI Boot Camp for Advisors Agenda Topics

The BEI Seven Step Exit Planning Process™ shows a business owner how to reach his or her ultimate goal—exiting the business in style—in a way that motivates him or her to engage in the process. Within the online Boot Camp for Advisors program, we cover:

- The BEI Seven Step Exit Planning Process
- Identify Exit Objectives
- Quantify Personal and Business Financial Resources
- Maximize and Protect Business Value
- Ownership Transfers to Third Parties
- Ownership Transfers to Insiders
- Business Continuity
- Personal Wealth and Estate Planning
- Component-Based Recommendations
- Your Referral Opportunity
- Your Exit Plan Creation Options
- Overcoming Common Business Owner Objections to Exit Planning
- How to Attract and Engage Owners with Exit Planning
- How to Apply Exit Planning to your Practice

Register today for a online Boot Camp for Advisors by: Calling toll free: 888-206-3009 or Visiting www.exitplanningforadvisors.com

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BEI BOOT CAMP FOR ADVISORS™ *Online*

Who Should Attend?: Professional Advisors

Continuing Professional Education credit hours earned: up to 11.5 CPA CE credits in the following:

Field of Study (NASBA): Marketing, Business Law, Personnel/HR, Taxes, Specialized Knowledge and Applications, Management Advisory Services, Business Management and Organization

National Registry of CPE Sponsors ID: 109178

Delivery Method: QAS Self-Study

Continuing Professional Education credit hours earned: 5 CFP® credits in the following:

Field of Study (CFP®): General, Insurance, Estate, Taxes, Employee Benefits, Specialized Knowledge and Applications/Technical Training (Exit Planning)

Advanced Preparation and Prerequisites

- For advanced preparation a Boot Camp Kit will be sent to you prior to Boot Camp which includes 1 copy of *How To Run Your Business So You Can Leave It In Style* and 1 copy of *Cash Out Move On*.
- Prerequisites are considered having knowledge of Business Owner Clients and being knowledgeable about the Business Owner market place in North America.

Program Level: Basic

Delivery Method: QAS Self-Study

Cancellation Policy

Boot Camp Online enrollment fees are non-refundable.

For more information regarding administrative policies such as complaint and refund, please contact BEI at 888-206-3009.

Pricing:

First Attendance/Non-Member:

\$995.00

Non-Member Support Staff:

\$995.00

BEI Full Member: \$595.00

BEI Member Support Staff: \$595.00



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