



CERTIFIED BUSINESS EXIT CONSULTANT®

CBEC®

International Exit Planning Association | 2026

"Exit Doers. Not just Exit Talkers."

1 | WHY EARN THE CBEC®: BENEFITS & PROVEN RESULTS

The CBEC® is not just a credential — it is a practice transformation. Advisors who earn it consistently outperform peers across key metrics, including fees, client retention, follow-on work, and advisory breadth. This designation is reserved for advisors ready to go beyond understanding exit planning concepts and start doing real exit planning work for business owners. The CBEC course trains to the Universal Exit Planning Deliverable and integrates our proprietary engagement survey tools to help assure effective use of the high-value content. The designation signals to clients, peers, and referral sources that you have mastered the knowledge, demonstrated the skills, and produced the work required to lead high-stakes ownership transitions. Advisors who complete the CBEC® program consistently report higher fees, more complex engagements, and deeper relationships with business owner clients.

The data below comes from the 2026 National Exit Planners Survey (405 respondents, 47 US states).

By the Numbers: CBEC® vs. the Field

Revenue & Engagement	Credential & Community
0% of CBEC® advisors work for free (vs. 36% of CEPAs)	71% expect more than half of clients to engage for further advisory work
44% (59% in 2024) charge \$10,001–\$25,000 for Phase 1 — highest of any group	Broadest service profile: Financial Planning, Insurance, and Tax Advice combined
10.3% of fee-based advisors now hold CBEC® (up from 1.7% in 2021)	77.8% structure engagements in multiple phases — highest of any group
87.5% use paid professional-grade AI — highest adoption of any credential	CBEC® is the only designation requiring a written exit plan submission as a condition of earning the credential

The CBEC® Difference: Exit Doers vs. Exit Talkers

It takes more than knowledge to earn the CBEC®. It is reserved for those who do exit planning work for business owners — not those who only seek to understand exit planning concepts. The majority of CBEC® designees have 10+ years of proven experience, have passed the proctored exam, and have submitted a written exit plan within one year of completing coursework.



What You Will Be Able to Do

- Describe your value proposition to business owners and position yourself for exit planning execution
- Lead comprehensive exit planning engagements — financial, operational, and strategic
- Confidently advise on capital markets, buyer types, and deal structures
- Use AI-assisted simulations to identify knowledge gaps and rehearse client conversations before real engagements
- Apply the Six-Step Exit Planning Process to any business owner situation
- Produce and deliver a professional-quality written exit plan
- Access the IEPA Referral & Collaboration Portal for case partnerships with other CBEC® advisors

The Six-Step Exit Planning Process

At the heart of the CBEC® is a proprietary Six-Step Exit Planning Process — released in 2008 and proven over 18 years — that simplifies a complex, multi-discipline topic into a clear, repeatable framework any advisor can use with any business owner.

Step 1	Establish Exit Goals Define what the owner wants from the exit in financial and personal terms.
Step 2	Measure Financial and Mental Readiness Assess personal readiness on 2 critical metrics (use BERI tool & stats for engagement)
Step 3	Define the Type of Exiting Owner the Client Most Resembles Identify the type of exiting owner, their preparedness, to gain clarity and goal alignment
Step 4	Learn and Choose Your Optimal Exit Option Evaluate internal and external transfer options that align with owner goals.
Step 5	Understand the Value of the Option You Choose Examine the range of business values and what each exit path will yield.
Step 6	Execute Your Exit Strategy Plan Implement the plan through advisor collaboration, deal structuring, and execution.



2 | COURSE CONTENT: THE 12 DOMAINS OF THE CBEC®

The CBEC® body of knowledge spans 12 comprehensive domains. Self-paced online modules deliver foundational knowledge across all 12 domains. Six live Executive Study Group sessions then apply that knowledge to real-world strategy, case review, and practitioner dialogue.

Domains 1–6	Domains 7–12
Domain 1: Introduction to Exit Planning	Domain 7: Business Value Growth Planning
Domain 2: The Exit Planning Marketplace	Domain 8: External Transfers
Domain 3: Exit Readiness, Owner	Domain 9: Internal Transfers
Domain 4: Exit Readiness, Company	Domain 10: Deal Structuring, Tax, Agreements
Domain 5: Understanding the Corporate Entity	Domain 11: Collaborative Advisory Teams
Domain 6: Valuation & the Range of Values	Domain 12: Writing the Exit Plan

Six-Week Executive Study Where Live Learning Comes to Life

Six weekly live sessions (virtual, 3:30–5:00 PM ET) take advisors deep into the most strategic dimensions of exit planning, including building perspectives on:

Step 1	Week 1 – Exit Planning Overview Understanding the marketplace, opportunity and the IEPA 6-Step Process.
Step 2	Week 2 – Goals, Readiness and Tools Assessing goals, owner and company readiness, IEPA tools for effective engagement
Step 3	Week 3 – Perspective on Valuation Understanding and applying valuation concepts across the range of business values.
Step 4	Week 4 – External Transfers & Value Growth The sale process - applying external exit strategies that align with owner goals.
Step 5	Week 5 – Internal Transfers Where internal transfers are optimal and how to align strategies with owner goals.
Step 6	Week 6 – Going to Market / Building Your Practice Exit Plan delivery, execution, pro tips, practitioner panel, and Q&A.

Executive Study Group Session Includes:

Each week helps to build the attendees’ perspective, which complements the self-paced, online recorded modules that comprise the curriculum. This combination provides attendees with a forum to ask questions, understand how the training is applied in conversations as well as in the written exit planning deliverable.

- Sessions run by IEPA team members, IEPA Faculty and Exit Planning practitioners
- Conversation focused on content and practice management that apply CBEC® concepts to practice
- Drafting support using the Universal Exit Plan Writing Template

The Executive Study Group session allows for interaction that helps to close the gap between live instruction and zoom / virtual classes. This develops practitioners as much as it teaches concepts.



3 | AI-ASSISTED ROLE PLAY & KNOWLEDGE ASSESSMENT

Since 2007, the IEPA has never stopped innovating. The first version of CBEC was a week-long, live course (2010 – 2016). IN 2017 we made the shift to virtual learning (CBEC 2.0 2017 – 2022). In 2023 we stopped using ‘live training time’ to deliver content by pre-recording materials and making our sessions interactive with faculty and practitioners (CBEC 3.0). Now, CBEC 4.0 introduces a suite of AI-powered tools that transforms how advisors learn, practice, and deliver exit planning services — creating a more personalized, scalable, and results-driven experience for every student. The AI role play available through the CBEC 4.0 program helps assure that you not only learn the concepts, but that you can also practice articulating those concepts to a simulated instructor as well as a simulated business owner.

The Knowledge Gap Assessment: Your Starting Point

Every CBEC® journey now begins with a personalized AI-powered baseline evaluation — a free, 25-minute role-play simulation that identifies exactly where your knowledge and communication skills stand across all 12 Domains. It allows us to customize training on a per-advisor basis.

How It Works

1. Book your time window — you'll receive a 24-hour access period.
2. Complete the 25-minute assessment at your convenience during your scheduled window.
3. Receive your personalized analysis and schedule a follow-up conversation to discuss next steps.

Take the Knowledge Gap Assessment by emailing leanne@theiepa.com

Real-Time AI Scoring Metrics

The assessment platform goes beyond right-or-wrong scoring. Each simulation evaluates advisors on a full suite of performance dimensions:

Communication Performance	Knowledge & Content Metrics
Pacing	Voice Inflection
Eye Contact	Confidence Level
Objection Handling	Articulation of Key Concepts
Word Fillers & Repetition	Comprehension of CBEC® Domains

The Coaching and Analytics section provides targeted feedback on both comprehension and presentation style — giving advisors a clear, actionable picture of where they excel and where to focus development.

AI-Assisted Role Play Simulations

- Practice real client conversations before entering actual engagements
- Receive immediate, objective feedback on communication performance
- Identify knowledge gaps across all 12 CBEC® domains before the exam
- Build confidence through repetition in a low-stakes simulated environment
- Track improvement over time with personalized analytics



4 | FREE YEAR OF IEPA MEMBERSHIP — A \$2,000 VALUE

Every CBEC® registration includes a complementary one-year IEPA Engagement Tools Membership — included at no additional cost. This is the same membership advisors pay \$2,000 per year to access after their first year.

What's Included in Your Complimentary Membership

Engagement Tools	Community & Resources
Business Exit Readiness Index™ (BERI™) — unlimited use	Monthly Member Training Calls
Owner Dependence Index™ (ODI™) — unlimited use	Referral and Collaboration Portal Access
Growth Planning Index™ (GPI™) — unlimited use	25% Discount to IEPA Annual Conference
Universal Exit Plan Writing Template	Practitioner support from the IEPA community
Course Library Access	AI Knowledge Gap Assessment (NEW)

Course Materials Included with Registration

- Private Capital Markets: Valuation, Capitalization, and Transfer of Private Business Interests
- Middle Market Strategies: How Private Companies Use the Markets to Create Value
- Straight Talk About Planning Your Succession
- The Right Side of the Table: Where Do You Sit in the Minds of the Affluent?
- Valuation for M&A: Building and Measuring Private Company Value
- An Introduction to ESOPs
- Exiting Your Business, Protecting Your Wealth (Leonetti, 2008)
- AI-Assisted Role Play Simulations (NEW 2026)

IEPA Membership Tiers (Post-Designation)

All CBEC® designees must maintain IEPA membership to sustain their designation. Five tiers offer progressive levels of access:

Membership Tier	Annual Investment
CBEC® Maintenance	\$395 / year
Course Subscription	\$995 / year
Engagement Tools (Included free with CBEC® registration)	\$2,000 / year
Marketing & Practice Management	\$3,000 / year
Executive Study Groups Access	\$6,000 / year



5 | ABOUT THE IEPA

The International Exit Planning Association (IEPA) is a practitioner development organization that offers and maintains the standards around the Certified Business Exit Consultant (CBEC®) designation. In addition to the certification, the IEPA supports its members with engagement tools, marketing materials, topical education, planning support, prospect research reports, and peer-to-peer networking for exit planning practitioners around the world.

Our founder, John Leonetti, CBEC®, authored *Exiting Your Business, Protecting Your Wealth: A Strategic Guide for Owners and Their Advisors* in 2008. The centerpiece of that work is the Six-Step Exit Planning Process, which has simplified exit planning for advisors and owners for nearly two decades.

18

Years leading exit planning education

600+

CBEC® Course Attendees

1,000+

Professionals trained through IEPA programs over two decades

Our Mission

The IEPA has one major mission: to train and support advisors so that they can help business owners solve problems related to their illiquid wealth. Our members are the leading 'exit doers' in the marketplace. We share what we know in abundance while supporting implementation through study groups, mentorship, and ongoing cohort peer groups who are winning exit planning engagements and driving best practices industry-wide.

Who Should Attend

The CBEC® program is offered to professionals who help business owners solve problems, including:

CPA | Valuation Analyst | Exit Planner | Financial Planner | Attorney | Consultant | CExP | CEPA | CM&AA | CFO

CPE Credit

Category	Details
Delivery Method	Group-Live and Group Internet-Based
Program Level	Advanced
Field of Study	Specialized Knowledge
Total CPE Hours	Up to 14 Hours



6 | 2026 SCHEDULE, PRICING & GETTING STARTED

Registration Fee: \$3,000 per session. Early and best-rate discounts are available — see dates below.

Winter Session 2026

Pre-CBEC® Orientation	Wednesday, February 4, 2026
Study Group Dates	Wednesday, Feb 18 – Wednesday, Mar 25, 2026
Location	Virtual (Zoom)
Session Times	Weekly, 3:30 PM – 5:00 PM ET
CBEC® Executive Review	Thursday, April 2, 2026
CBEC® Proctored Exam	Friday, April 3, 2026
25% Off (Best Rate) Expires	December 31, 2025
15% Off (Early Bird) Expires	January 20, 2026
Registration Fee	\$3,000

Spring Session 2026

Pre-CBEC® Orientation	Wednesday, April 29, 2026
Study Group Dates	Wednesday, May 6 – Wednesday, Jun 10, 2026
Location	Virtual (Zoom)
Session Times	Weekly, 3:30 PM – 5:00 PM ET
CBEC® Executive Review	Thursday, June 18, 2026
CBEC® Proctored Exam	Friday, June 19, 2026
25% Off (Best Rate) Expires	March 31, 2026
15% Off (Early Bird) Expires	April 17, 2026
Registration Fee	\$3,000

Fall Session 2026



Pre-CBEC® Orientation	Wednesday, September 30, 2026
Study Group Dates	Wednesday, Oct 14 – Monday, Nov 18, 2026
Location	Virtual (Zoom)
Session Times	Weekly, 3:30 PM – 5:00 PM ET
CBEC® Executive Review	Thursday, December 3, 2026
CBEC® Proctored Exam	Friday, December 4, 2026
25% Off (Best Rate) Expires	August 31, 2026
15% Off (Early Bird) Expires	September 18, 2026
Registration Fee	\$3,000

How to Qualify for the CBEC® Designation

1. Complete the CBEC® Candidate registration form and pay the registration fee.
2. Complete the AI Knowledge Gap Assessment to establish your baseline and personalize your learning path.
3. Work through the self-paced modules covering the 12-Domain body of knowledge.
4. Attend the six-week Executive Study Group live sessions.
5. Pass the CBEC® Proctored Exam.
6. Produce and submit a written exit plan meeting the CBEC® standard of quality (supported by the Plan Writing Course).
7. Maintain membership in good standing, abide by ethical standards, and complete 10 hours of continuing education annually.

Cancellation Policy

Cancellations received in writing two weeks prior to the first day of the training event will be eligible for a refund, less the cost of any course materials not returned to the IEPA. For more information, contact our offices at (781) 821-2608.

Ready to Become a CBEC®?

Join the fastest-growing credential in exit planning.

www.theiepa.com

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