



BEI's Boot Camp for Advisors™

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.

Specifically, the Boot Camp for Advisors two-day seminar provides you with:

- The ability to approach, present and engage business owners through Exit Planning.
- The competitive advantage to set your business apart from others in the community with advanced training and exceptional marketing tools.
- The opportunity to enhance revenue streams while helping clients benefit from their lives' work.
- The opportunity to provide positive short-term impact for your client's companies, while positioning you as the expert to help them meet their long-term Exit Planning objectives.
- Techniques for using Exit Planning as a door opener for engaging existing clients and new business owner clients for long-term strategic planning.

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. During the two-day Boot Camp for Advisors Seminar, 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 an upcoming Boot Camp for Advisors by: Calling toll free: 888-206-3009 or Visiting www.exitplanning.com

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BEI BOOT CAMP FOR ADVISORS™

Who Should Attend?: Professional Advisors

Continuing Professional Education credit hours earned: up to 12 CE credits in the following:

Field of Study (NASBA): Taxes, Marketing, Communications, Management Advisory Services, Business Management and Organization

National Registry of CPE Sponsors ID: 109178

Delivery Method: Group-live

Continuing Professional Education credit hours earned: 5.5 CFP® credits in the following:

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

Business Enterprise Institute 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.learningmarket.org

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: Group-live

Cancellation Policy

You must notify BEI directly if you need to cancel your registration from a BEI Boot Camp for Advisors or other BEI event. For more information regarding refund, complaint and/or program cancellation policies please contact BEI on weekdays between 8 a.m. and 5 p.m. Mountain time at 888-206-3009 or events@exitplanning.com.

Cancellation requests received at least 30 days before the start of the event are eligible for a full refund. Cancellation requests received less than 30 days before the event will receive a refund of 50% of registration fees paid. Once a live or online event or program has begun, BEI is not able to provide a refund. Each registrant is responsible for his/her own transportation and accommodation reservations and cancellations, if applicable.

Pricing:

First Attendance/Non-Member:
\$995.00

Non-Member Support Staff:
\$995.00

BEI Full Member: \$595.00

BEI Member Support Staff: \$595.00

