

# Advanced Exit Planning Series

When you deliver comprehensive, customized planning solutions to your business clients, you'll be glad to have the knowledge you gained from this program. Completing the Advanced Exit Planning Series is critical to providing comprehensive Exit Planning services to the business-owning community. The primary goal of this program is to provide you with information that will serve as a solid foundation for your professional Exit Planning endeavors.

## Curriculum

**This series takes an in-depth look at the following topics:**

1. Setting Goals
2. Gap Analysis
3. Cash Flow and Business Value
4. Growing Value and Minimizing Taxes
5. Developing Key Employees
6. Minimizing Risk
7. Third-Party Sale Transactions
8. Selling to an ESOP
9. Transferring Ownership to Employees or Management
10. Transferring Ownership in a Family Business
11. Business Continuity for Co-Owned Businesses
12. Business Continuity for Solely-Owned Businesses
13. Estate Planning Techniques for Business Clients
14. Putting Together a Comprehensive Plan



# Ideal Candidates

This program is designed for:

- Professional advisors who go above and beyond their professional peers to deliver high-quality, well-rounded planning solutions to business clients.
- Advisors who want to expand their awareness of the issues and strategies that impact business clients.
- Individuals who have completed the BEI Exit Planning Boot Camp and want to move to the next level (this is a required prerequisite).

## Program Format

**This program includes:**

- Self-paced online articles, videos, discussion questions, and case studies
- Live video discussion sessions to review, discuss, and review program content
- Exams following each Module to demonstrate knowledge

## Continuing Education

For more information about CE credits, learning objectives for each program module, program level, advance preparation, refund and cancellation policies, and complaint resolution procedure, please visit <https://www.exitplanning.com/training-program-details>.

### Pricing:

Non-License holders - \$4,000

BEI Members - \$1,795

## Enroll Today

Learn more about this program and enroll today by visiting [www.ExitPlanning.com](http://www.ExitPlanning.com) and completing the [Contact Us](#) form.

