



BOOT CAMP FOR ADVISORS

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

Business owners are exiting their companies in record numbers. Establishing a comprehensive Exit Planning Process should be at the forefront of every business owner's mind. Boot Camp for Advisors provides advisors with in-depth training and a proven, systematic process for helping their clients successfully exit their businesses. It also helps advisors identify opportunities for growing their businesses through Exit Planning.

BEI's two-day Boot Camp for Advisors seminar provides you with the following:

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

You have the technical skills to assist owners in Exit Planning. BEI can help you learn how to package the process and use it to drive demand for your services. Attending a BEI Boot Camp for Advisors can help you begin implementing Exit Planning into your practice today, allowing you to take advantage of all of the opportunities that Exit Planning can offer. Don't miss this opportunity to set yourself apart from the competition.

AGENDA TOPICS

The BEI Seven Step Exit Planning Process™ shows business owners how to reach their ultimate goal--exiting the business in style--in a way that motivates them to engage in the Process. During the two-day Boot Camp for Advisors seminar, we will cover the following:

- The BEI Seven Step Exit Planning Process
- Identifying Exit Objectives
- Quantifying Personal & Business Financial Resources
- Maximizing & Protecting Business Value
- Ownership Transfers to Third Parties
- Ownership Transfers to Insiders
- Business Continuity
- Personal Wealth & Estate Planning
- Component-Based Recommendations
- Advisor Referral Opportunities
- Advisor Exit Plan-Creation Options
- Overcoming Common Business-Owner Objections to Exit Planning
- How to Attract & Engage Owners with Exit Planning
- How to Apply Exit Planning to Your Practice

WWW.EXITPLANNING.COM | (303) 321-2242

2000 S. Colorado Blvd., Denver, CO 80222

BEI BOOT CAMP FOR ADVISORS

Who Should Attend? Professional advisors who have experience with working with business owners to plan for the future of the ownership interest.

Level: Basic/Overview

Continuing Professional Education credit hours earned: 12.0 Continuing Education credits for CPAs in the following

Fields of Study (NASBA): Taxes (4.0), Communications and Marketing (4.0), Management Services (2.0), Business Management & Organization (2.0)

National Registry of CPE Sponsors ID: 109178

CFP® Sponsors ID: 3069

CFP® Program ID: 199696

Delivery Method: Group-live

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

Principal Knowledge Topic Categories (CFP®): Tax Planning (3.5), Retirement Savings and Income Planning (1.0), Estate Planning (1.0)

Register for an upcoming Boot Camp for Advisors by calling toll-free: 888-206-3009 or visiting www.exitplanning.com

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 (ID: 109178). 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 or at 150 Fourth Avenue, Suite 700, Nashville, TN, 37219-2417.

Advanced Preparation and Prerequisites

For advanced preparation, a Boot Camp Kit will be sent to you prior to Boot Camp, which includes a copy of *Exit Planning: The Definitive Guide*. Prerequisites are considered having knowledge of business-owner clients and being knowledgeable about the business-owner marketplace.

Program Level: Basic Delivery

Method: Group, live



Pricing:

First Attendance/Non-Licensed Member: \$1,495.00

Non-Licensed Member Support Staff: \$1,495.00

BEI Licensed Member: \$1,095.00

BEI Licensed Member Support Staff: \$1,095.00

Cancellation policy

You must notify BEI directly if you need to cancel your registration to a BEI Boot Camp for Advisors or other BEI event. For more information regarding refunds, complaints, and/or program cancellation policies, please contact BEI Monday through Friday 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 fewer 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 or her own transportation and accommodation reservations and cancellations, if applicable.



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