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 at the forefront of every business owner's mind. Boot Camp for Advisors Online not only helps advisors identify opportunities for growing their business through Exit Planning but 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 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 each advisor's role on the Advisor Team. Participants will identify typical business-owner objectives, and will distinguish the roles of business value and business cash flow in planning for a future ownership transaction. Participants will also learn how to identify the key features of planning techniques that they can apply to maximize and protect business value, successfully transition ownership to either a third-party buyer or an "insider" (e.g., family, co-owner, employee), provide for business continuity after the owner's death or incapacitation, and prepare the business owner for when he or she must address personal planning issues that arise when dealing with business issues.

Every advisor has the technical skills to assist owners in Exit Planning, but few know how to package the process and use it to drive demand for their services. Attending a BEI Boot Camp for Advisors Online can help you begin implementing Exit Planning into your practice today and allow 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.

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 following:

- The BEI Seven Step Exit Planning Process
- Identifying Exit Objectives
- Quantifying Personal and Business Financial Resources
- Maximizing and Protecting Business Value
- Ownership Transfers to Third Parties
- Ownership Transfers to Insiders
- Business Continuity
- Personal Wealth and Estate Planning
- Component-Based Recommendations
- Advisor Referral Opportunities
- Advisor 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 Online by calling toll free: 888-206-3009 or visiting www.exitplanning.com

BEI BOOT CAMP FOR ADVISORS *ONLINE*

Who Should Attend? Professional Advisors who have experience with working with Business Owner clients to plan for the future of the ownership interest.

Level: Basic/Overview

Continuing Professional Education credit hours earned: 11.5 Continuing Education credits for CPA's in the following: **Fields of Study (NASBA):** Communications and Marketing (1.0), Business Law (0.5), Personnel/ Human Resources (2.0), Taxes (1.5), Specialized Knowledge (4.5), Management Services (1.0), Business Management & Organization (1.0)

National Registry of CPE Sponsors ID: 109178

CFP® Sponsors ID: 3069

CFP® Program ID: 199694

Delivery Method: QAS Self-Study

Continuing Professional Education credit hours earned: 5.0 CFP® credits in the following **Principal Knowledge Topic Categories (CFP®):** Tax Planning (1.0), Retirement Savings and Income Planning (2.0) Estate Planning (2.0)

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 market place in North America.

Program Level: Basic

Method: QAS Self-Study

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.

Pricing

First Attendance/Non-*M*ember: $995.00
Non-Member Support Staff: $995.00
BEI Full Member: $595.00
BEI Member Support Staff: $595.00

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.