



The BEI Network of Exit Planning Advisors



MORE CLIENTS, MORE PROFITS, MORE RECOGNITION.

BEI provides comprehensive Exit Planning practice-development tools, education, and ongoing support to advisors like you. By becoming a part of The BEI Network of Exit Planning Advisors, you'll gain access to a wide range of benefits, including an established process that differentiates you from your competitors, lets you easily manage your clients' Exit Plans, and helps your clients achieve their exit objectives.

Advisors skilled in Exit Planning expand their client bases by addressing issues that keep their clients up at night. Whether you want to be a full-fledged Exit Planner or focus on particular elements of Exit Planning, BEI can help you broaden your scope of work and attract new clients to your core practice.



Practice Growth

As a Member of BEI, you'll have the best tools and support to engage business owners in planning for the future success of their businesses and lives. Over 90% of advisors who join BEI have experienced growth in their Exit Planning practices and continue to expect growth.

Comprehensive Tools

BEI is the only association to offer comprehensive Exit Planning software (EPIC). EPIC increases your efficiency, thoroughness, and trustworthiness by providing sophisticated recommendations and letting you address your clients' unique planning needs without reinventing the wheel each time.



Planning Support

BEI Members have exclusive access to customized support from the Member Success Team and from other advisors in the network. BEI uses industry best practices, virtual practice groups, one-on-one coaching, and group support to help advisors with the important planning they do for business owners.



CUTTING-EDGE PROFESSIONAL DEVELOPMENT

Boot Camp for Advisors

The first step in every Exit Planning Advisor's training, Boot Camp shows advisors how to incorporate The BEI Seven Step Exit Planning Process to grow their core practices.

Advanced Exit Planning Series

BEI's Advanced Exit Planning Series gives advisors the foundation for professional Exit Planning endeavors and is a requisite for BEI's Certified Exit Planner designation.

Certified Exit Planner Designation

BEI's nationally renowned Certified Exit Planner designation (CEXP) demonstrates advisors' tested abilities to provide comprehensive Exit Planning services to their clients.

BEI MEMBERSHIP

Full License

The BEI Full Service License is designed for advisors who want the full spectrum of services that BEI has to offer. Using all the tools, materials, and strategies BEI offers, the Full License provides you with a comprehensive planning system designed to fit within your existing practice. Take advantage of a full range of networking, marketing, and planning solutions that will attract and engage your clients through the Exit Planning Process.

Business owners want trustworthy advisors to help them plan for the most important financial event of their lives. Are you ready to be the advisor they're asking for? Become a BEI Member to help your clients get what they want, need, and deserve from their successful businesses.

Marketing License

If you already have a planning system in place or want ways to attract new clients to your core practice, the Marketing License is the best place to start. The Marketing License is for you if you want everything from Associate Membership, plus:

- Exclusive marketing platforms and deliverables that differentiate you as a trusted advisor.
- Tools, materials, and support that let you attract and engage clients through Exit Planning.
- Brandable marketing materials that establish you as an expert to your clients and grow your core practice.



Planning License

If you are looking to streamline your planning work, the Planning License is for you. In addition to Associate Membership perks, you'll receive access to:

- The industry's only plan creation software, EPIC, so you don't have to reinvent the wheel with every plan.
- Implementation tools specifically designed to keep the planning process moving.
- Personalized individual training and support on plan design concepts.

Associate Membership

If you're looking to learn how planning concepts can help you broaden the scope of work you do with your clients, the BEI Associate Membership is your answer. The Associate Membership is for you if you want:

- Planning techniques that bring more prospects to your existing practice.
- Tools and resources that let you ask the right questions and give the right answers to make owners want to work with you.
- Short- and long-term solutions to problems that keep business owners awake at night.

The benefits of joining The BEI Network of Exit Planning Professionals are clear. If you would like more information about the benefits of being a BEI Advisor or any of BEI's Membership Levels, please contact us today.