

EXIT PLANNING INSTITUTE UNVEILING NATIONAL SURVEY RESULTS AT ANNUAL STATE OF THE INSTITUTE

Data to define current and emerging exit planning trends

CLEVELAND, OH, UNITED STATES, January 18, 2024 /EINPresswire.com/ -- The Exit Planning Institute (EPI) is holding its annual [State of the Institute Address](#) on Feb. 29 from 1-2 p.m. ET.

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Scott Snider, President of Exit Planning Institute

During this year's address, Scott Snider, President of Exit Planning Institute, will unveil the results of the organization's National State of Owner Readiness™ Survey—the first national study since 2013 to measure owner readiness in transitioning private businesses to new ownership.

“We're excited to share what we learned with the broader exit planning advisory community,” says Snider. “As you can imagine, a lot has changed since 2013, and it's been interesting to see the advancements and emerging trends, as well as the gaps that still exist. Anyone working in exit planning will benefit from the study.”

Sign Up for Free Broadcast

The State of the Institute live broadcast is open to anyone involved with or interested in exit planning. Registration is free, simply [sign up online](#) prior to the event. Attendees will get a first look at advancements, exit planning market insights, the future of EPI, and trends and topics for [Certified Exit Planning Advisors](#). Specifically, EPI will share what was learned from the 1,162 U.S. business owners who participated in the National State of Owner Readiness survey, including:

- How many have sought external help with exiting their business
- How many have formal exit plans/teams in place
- Who serves as the most trusted advisor
- How owners vary among the various generations represented, from baby boomers to Gen Z
- Actionable initiatives that can impact owner readiness and improve the probability of a successful transition

The Exit Planning Institute® was founded in 2005, and the Certified Exit Planning Advisor® (CEPA)

credentialing program was launched in 2007. The CEPA® credential relates to the technical skills of advisors who work with business owners. EPI is committed to providing the best exit planning content in the industry, ongoing practice support for advisors, and connectivity to business owners. CEPA is the fastest-growing and most widely accepted exit planning credential in the world.

About the National State of Owner Readiness Survey

The National State of Owner Readiness Survey assessed:

- Specific trends of both successful and unsuccessful business transitions
- Factors that impact the valuation of companies prior to and following transition to new ownership
- Insights that current owners can use to enhance their exit strategy
- Impact of COVID-19 on owner readiness
- Differences in national owner readiness over the last 10 years

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