

EPI Announces Powerful line-up for Women in Exit Planning Symposium

Lineup for one-day event focuses on mindset, includes trailblazing CEOs and founders

CLEVELAND, OHIO, USA, April 10, 2024 /EINPresswire.com/ -- [Exit Planning Institute](#) (EPI) has announced its speaker line-up for the one-day [Women in Exit Planning Symposium](#) on April 28. The symposium is occurring as part of the organization's annual [Exit Planning Summit](#) in Marco Island, FL.

During this one-day event, participants will attend interactive, action-oriented workshops with national experts and leading practitioners on topics such as building your advisory team, communicating your value, and closing dream clients. The symposium will feature the following speakers:

AMY WIRTZ, "WOMEN CEPAS SHOULD FOCUS ON FAMILY-OWNED BUSINESSES: WHERE WOMEN ARE TAKING THE LEAD"

In the opening session, Amy Wirtz will discuss how women are impacting their communities and world economies inside of multigenerational family businesses. She'll talk about the special link women have to family businesses, with examples of women who are excelling in leadership roles within family



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businesses. Wirtz is a senior consultant with The Family Business Consulting Group (thefbcg.com) who is passionate about helping families develop and define their purpose. She works closely with families to identify their goals around values, ownership and financial wealth

KERRY SIGGINS, "OWNERSHIP MINDSET"

Kerry Siggins will lead an interactive session on the Ownership Mindset. She is the CEO and Executive Chair of StoneAge Holdings (stoneageholdings.com), a fast-growing manufacturing and technology company based in Colorado. Under her leadership, StoneAge has seen double-digit growth every year. In 2015, Siggins transitioned the company to an Employee Stock Ownership Plan (ESOP), ensuring all employees benefit from ownership.



Julie Keyes will close the symposium with a discussion on how women entrepreneurs are an untapped market for advisors.

JULIE KEYES, "WOMEN ENTREPRENEURS: AN UNTAPPED MARKET"

Julie Keyes will close the symposium with a discussion on how women entrepreneurs are an untapped market for advisors. Her talk will help participants determine ways to be more proactive in building their woman-owned book of business. Keyes is the founder of KeyeStrategies (keyestrategies.com) where she specializes in exit and transition consulting. She is an EPI faculty member, a member of its Leadership Council, and a recipient of EPI's "Thought Leader of the Year" in 2017 and 2022.

EXPERT PANEL ON BEING A WOMAN IN BUSINESS

The symposium will include a panel where experts will discuss having hard conversations in business, emotional intelligence, and redefining family wealth.

SIGN UP FOR THE EXIT PLANNING SUMMIT

The Women in Exit Planning Symposium is open to any professional advisor who is a woman in exit planning, works with women in exit planning, is a woman business owner, or works with women business owners. □ Bundle your Exit Planning Summit registration with the Women in Exit Planning Symposium for three days of exit planning and business development content. □

The Exit Planning Summit, powered by REAG, will take place in Marco Island, Fla. from April 28-30. Through workshops, Learning Labs, breakout sessions, networking, and a keynote address from Gerry O’Brion, advisors will learn how to enhance business value and align personal and financial strategies for business owners.

Register at www.exitplanningsummit.com.

ABOUT EPI

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.

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