

EPI UNVEILS 2024 HIGHLIGHTS & 2025 INITIATIVES AT ANNUAL STATE OF THE INSTITUTE ADDRESS

CLEVELAND, OH, UNITED STATES, February 20, 2025 /EINPresswire.com/ -- [Exit Planning Institute](#)® (EPI) held its annual State of the Institute Address yesterday, where EPI President Scott Snider unveiled 2024 highlights and 2025 initiatives, including the [Exit Planning Summit](#), [DriveValue.com](#), Beyond CEPA, and the Annual Exit magazine.



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Scott Snider, President of The Exit Planning Institute

"We're excited for the future. We want to get in the top 20 markets across the U.S. and the top five entrepreneurial or emerging business-friendly markets," Snider says. "We want to change the way we do business in America, helping owners shift from focusing on year-over-year income to long-term value creation that builds significant companies for generations of owners and employees."

2024 EPI HIGHLIGHTS

EPI—which provides credentialing and continuing

education to business advisors who support owners as they seek to create value before exiting their business—had a successful 2024. Highlights included:

- Release of the National State of Owner Readiness™ Report—the first of its kind in 10 years
- Testimony before the U.S. Senate about succession planning
- Addition of 2,000 Certified Exit Planning Advisors (CEPA®)
- Recognition as one of the top 100 small businesses by U.S. Chamber of Commerce
- Launch of DriveValue.com

SHIFTING MARKET TRENDS

Snider highlighted key market trends that are creating more opportunities for CEPAs and other professionals who assist small business owners. Notably, a projected \$9 trillion wealth transfer is expected over the next five years, with 57% of Baby Boomer owners and 38% of Generation X owners intending to exit during this timeframe. Unsurprisingly, 69% of owners cite exit planning as one of their top priorities.

Exit planning is crucial for younger business owners, including Generation X and Millennials. They are more likely than Baby Boomers to have formal, written exit plans and to engage a team

of advisors for guidance—things that accelerate a company's value before an exit is imminent. Snider attributes this proactive approach to the availability of extensive exit planning resources today, including books, podcasts, webinars, and more.

Additionally, in the last decade, the financial planner has emerged as a business owner's top advisor, followed by attorneys and accountants—all part of the core team EPI recommends that business owners put around them.

20 YEARS IN BUSINESS, SUBSTANTIAL GROWTH PLANNED

As EPI marks its 20th year in business, it unveiled several new initiatives to expand its reach. Six new chapters are planned for 2025 in Houston, Raleigh, Sarasota, St. Louis, San Francisco, and Nashville, bringing the total number of EPI chapters to nearly 40. As the organization works to grow the number of CEPAs—with the goal of making CEPA the third largest professional credential in the U.S.—EPI is focused on the following initiatives in 2025:

1) Beyond CEPA: A three-year continuing education journey for those who have earned the CEPA credential. Beyond CEPA provides a defined path for integrating exit planning into a business and becoming a recognized expert.

2) Exit Planning Summit: The Summit is a key way to advance exit planning knowledge, network with advisors throughout the country, and build a broader skill set through solutions labs, interactive sessions, and presentations.

3) EPI Academy: New courses planned for 2025 include Personal Planning Deep Dive, Preparing Heirs for the Money, and Accelerating Value by Maximizing Intellectual Property.

4) Annual Exit and Mastering the Market publications: These new publications from EPI provide insights and updates for professional exit planning advisors.

5) DriveValue.com: This new educational platform is geared toward business owners, giving them the tools and resources to increase business value, grow wealth, and align business, financial, and personal goals. The DriveValue.com NASCAR car— driven by Jimmie Johnson's NASCAR team, Legacy Motor Club—will debut at the Nashville Superspeedway. Additionally, eight regional DriveValue symposiums will be held in 2026.

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