

# ANNUAL EXIT PLANNING SUMMIT FEATURES WORKSHOPS ON THE TRIGGERING EVENT, WOMEN'S SYMPOSIUM, AND ADVANCED TAX PLANNING

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*Business Advisors Can Still Register for Florida Summit, May 4-6*

CLEVELAND, OH, UNITED STATES, February 26, 2025 /EINPresswire.com/ -- [Exit Planning Institute](#)® (EPI) announced its workshop offerings for the upcoming [Exit Planning Summit](#) in Charlotte Harbor, Fla., on May 4-6. The annual Summit, hosted by EPI, is the premier conference for advisors dedicated to enhancing business value and aligning personal and financial strategies for business owners.

Three key workshops highlight the event:

1) **Mastering the Triggering Event Workshop:** The triggering event is an independent personal, financial, and business assessment correlated to the business range of value. This first step in the Value Acceleration Methodology<sup>™</sup> not only tells owners what their business is worth today (if anything), but it also tells them what its potential best-in-class value may be. During this half-day interactive workshop, join a small, intimate group led by Christopher Snider—creator of the Value Acceleration Methodology, author of *Walking to Destiny: 11 Actions an Owner Must Take to Rapidly Grow Value & Unlock Wealth*, and CEO of EPI—who will provide insights and tips for advisors to sell, conduct, and deliver a triggering event.

2) **Women in Exit Planning Symposium:** The symposium includes interactive, action-oriented workshops and a moderated panel discussion on best practices for engaging women in the value accelerator journey. The symposium will feature the following speakers:

- Tina Corner Stolz, CEPA<sup>®</sup>, founder of LXCouncil
- Carrie Kerpen, CEPA<sup>®</sup>, founder of The Whisper Group
- Susan Latremaille, CPRC, FEA, ICD.D, MBA, co-founder of Next Chapter Advisors
- Jaclyn Ring, CMAP, MAMI, vice president, REAG
- Marianne Oehser, MM, CPRC, co-founder and partner, Next Chapter Lifestyle Advisors
- Kim Jenson, chief operating officer of Raymond James' Private Client Group

3) **Advanced Tax Planning Workshop:** Done in advance, tax mitigation strategies can have a huge impact on the net number that hits the owner's bank account—and the future cash flow. This

workshop—led by Shelly Lightfoot, CEPA®, co-owner of The Founders Group, and Joe Strazzeri, Esq., CEPA®, attorney and partner, Strazzeri Mancini LLP—is a survey of advanced tax and estate planning techniques and hot topics for business owners, including estate tax exemptions, portability, ILITs, discounting, buy/sell agreements, and the ten ways out of highly appreciated property.

#### REGISTER FOR THE EXIT PLANNING SUMMIT

More than 800 advisors, speakers, and partners are planning to attend the Exit Planning Summit, which includes workshops, resource and solutions labs, and breakout sessions. NASCAR legend Jimmie Johnson and business titan Maury Gallagher have teamed up for this year's keynote. The duo will join Scott Snider, EPI president, and Lori Long, president of Links Creative Alliance, for a "trackside talk" about building championship cultures that drive value and leave a lasting legacy. Other Summit speakers include Justin Goodbread, CEO of Financially Simple; John Warrilow, president of The Value Builder System; and Scott Mashuda, from REAG.

Register today at [www.exitplanningsummit.com](http://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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