

Fifth Annual Advisor Survey Shows Small Businesses Increasingly Seek Planning Assistance

Rapid growth in exit planning professionals can't keep pace with demand.

SAN ANTONIO, TX, UNITED STATES, April 22, 2025 /EINPresswire.com/ -- In the fifth annual National [Exit Planners Survey](#), over two-thirds of advisors responded that half or more of their clients are small business owners.

Although Private Equity has investments equal to approximately 20% of all equity in mid-market businesses, exit planning is increasingly undertaken by the owners of more Main Street companies. Main Street businesses are defined as having an Enterprise Value of less than \$3,000,000, and are most likely to be directly managed by an owner or owners.

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*John F. Dini, CExp, CEPA, CBEC,
CEMC Founder and CEO of
ExitMap*

Some 50% of small employers (5 to 500 employees) in the United States are owned by people over 60 years old. These are the Baby Boomers, born between 1945 and 1964. As a generation they have been characterized by their dedication to work in the pursuit of material comforts. As business owners, they have stayed “on the job” longer and in greater numbers than any previous generation.

An exodus from businesses ownership was predicted when the first Boomers turned 65 in 2010, but only about a third have done so to date. The remaining 2,000,000 business



owners with a median age of 70 are creating a surge in demand for financial and business planning services.

The surge in Baby Boomer transitions is supported by the survey results. Despite the rapid growth in the number of practitioners, over 86% reported that the number of their planning engagements in 2024 were equal to or greater than in 2023.



Certified ExitMap Coach (CEMC) Badge

According to John F. Dini, Founder and CEO of [ExitMap](#), "Exit Planning is largely a second skill for advisors. As the number of trained professionals grows, there are more advisors who serve Main Street businesses."

The National Exit Planners Survey was first conducted in 2021 by ExitMap LLC, a provider of coaching exercises for advisors to help owners determine their options and objectives in transition. In its first year, it was distributed to fewer than 3,400 advisors. By 2023 that number had grown to 4,288 advisors. In 2025 the surveyed population exploded to 7,346 advisors.

Business transition is a complex undertaking, and certified planners include business consultants, financial planners, appraisers, bankers, insurance agents, business brokers, attorneys and accountants. Virtually all practitioners (98%) expect exit planning to lead to additional advisory work in some or all cases.

ExitMap tracks the exit planning certifications awarded by three organizations in the industry, the Exit Planning Institute, Business Enterprise Institute, and the International Exit Planning Association. The 434 responses to the survey allow a confidence level (that the results represent the industry) of 99% with a 3.6% margin of error.

A copy of the National Exit Planners Survey is available for free download at www.ExitPlannersSurvey.com.

ExitMap LLC provides a system of software-driven coaching exercises to the exit planning industry. Many owners have difficulty adjusting to a retirement that lacks the activity, identity and purpose of being a business owner. ExitMap provides a streamlined framework for advisors to guide business owners through exit planning focused on their goals for life after the business.

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