



Exit Planning Institute® Launches Chapters in San Francisco and Sarasota

CLEVELAND, OH, UNITED STATES, May 16, 2025 /EINPresswire.com/ -- Cleveland-based [Exit Planning Institute®](#) (EPI) has launched two additional chapters in San Francisco, CA, and Sarasota, FL, bringing its total chapters globally to 29. Chapters provide a hub for advisors, leaders, and experts to network, earn continuing education, and collaborate on exit planning projects.

SAN FRANCISCO CHAPTER

EPI members Kurt W. Rauzi, ChFC, CEPA®, managing director of Dedicated Capital Advisors, and Joe Strazzeri, Esq., CEPA®, co-founder and partner of Strazzeri Mancini, LLP and The Founders Group, founded the [San Francisco EPI chapter](#). The chapter launched earlier this spring, with more than 80 attendees at its first event. It joins five other chapters in California.

"We wanted to connect with advisors in the Bay Area and help expand the exit planning network. I teamed up with Joe as well as Shelley Lightfoot," Rauzi says. "They've successfully founded two other chapters in Orange County and San Diego, and we're leveraging their experience to do the same in San Francisco."

The San Francisco EPI chapter will hold both virtual and live meetings to reach as many advisors as possible in its large geographic area. One of its upcoming events, which promises to be popular, is a unique take on networking: a Speed Dating session on Aug. 4.

SARASOTA CHAPTER

Nearly 70 professional business advisors attended the first session of the [Sarasota EPI chapter](#).

"I founded the EPI Sarasota chapter to unite the top minds on Florida's west coast—from Tampa to Naples—who are committed to coaching, advising, and serving closely held business owners. We chose the Sarasota area because of its thriving business community and strategic proximity to the entire region," says Adam Kazalski, ChFC, CEPA®, with FourFront Wealth Management. "Business owners are the backbone of our economy and the embodiment of the American Dream. Generation after generation, they invest their time, capital, and health to build businesses that fuel our communities and create opportunity. They deserve access to the best possible guidance to help them grow, transition, and align their wealth, family, and purpose—both in and beyond the business."

Dana Watkins, CEPA® and CEO of Due North Enterprises says the chapter has a strong leadership

team to help grow the chapter quickly.

“Our chapter leadership team are all CEPAs in various roles supporting the exit planning process,” Watkins says. “Our goal is to build our practices while helping business owners unlock the wealth they’ve built in their companies through a focus on relationships, serving each other, and serving our community.”

The chapter, which launched March 2025, meets monthly, with the exception of July and August. Before the summer break, the Sarasota chapter is looking forward to its chapter social at Oak and Stone on June 5 at 5 p.m.

“We’ll be building relationships through networking while enjoying wood-fired pizza and their famous Wall of Beer,” Watkins shares.

ABOUT EPI CHAPTERS

Every chapter is led by a top Certified Exit Planning Advisor® (CEPA) and a local leadership team to cultivate a go-to source for advisors and business owners alike. As natural collaborators, these chapters forge strong bonds with influential organizations, including local media outlets and business journals, colleges and universities, major financial/professional services brands, and reputable member associations like AICPA, AM&AA, ACG, NACVA, and more.

ABOUT EXIT PLANNING INSTITUTE

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. Learn more about EPI on their LinkedIn or website.

Taylor Haydu
Exit Planning Institute
216-712-4244
[email us here](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/812923818>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2025 Newsmatics Inc. All Right Reserved.