

# EPI Institute Launches Diefendorf's 'More Than Money' Course

*CEPA's gain access to the "holy grail" for preparing heirs for the money.*

SIOUX FALLS, SD, UNITED STATES, June 9, 2025 /EINPresswire.com/ -- As part of the EPI Institute's Continuing Education program, on May 31, 2025, EPI launched a new course instructed by Roey Diefendorf.

Roey is a 50+ year veteran advisor and a Certified Exit Planning Advisor (CEPA).

This course introduces the CEPA to not just the importance of "preparing the money for the heirs" but how to "prepare the heirs for the money." What is the "preparing heirs" conversation? It is the critical element for the successful multi-generational transfer of wealth.

This course shows the CEPA how to not just begin these conversations, but to engage generations in passing on their values in addition to their valuables, which is the key to making their exit plan complete.

The course addresses these areas:

- Understanding the Six Laws of Family Advancement & Sustainability.
- Redefining wealth into 3 dimensions ([more than money](#)).
- Integrating the 5 Pillars of Multi-Generational Success into the EPI Value Acceleration Process.
- More specifically, how to prepare the rising generations while simultaneously using the Prepare Gate, Discover Gate and Decide Gate process.
- Adding the "Family Wealth Preparedness Survey" to the current EPI surveys of preparing the owner for his/her exit and preparing the business for its transition.
- Guiding the family meeting process, which is the cornerstone for building an interdependent family.



**NEW EPI ACADEMY COURSES—**  
*EXPAND YOUR EXPERTISE!*

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**Your Instructor:**  
**Roey Diefendorf, CEPA**

**Preparing the Heirs for the Money**  
*Understand the 6 Laws of Family Advancement & Sustainability.*

REGISTER FOR A COURSE

**EPIACADEMYCOURSES.COM**



EPI Diefendorf Course

- “FamTec” (family + technology) as a powerful, time efficient tool for engaging all generations.

For more information, you can go to [www.MoreThanMoney360.com](http://www.MoreThanMoney360.com).

Monroe Diefendorf

MTM Enterprise

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