



The Exit Planning Institute® Releases Generational State of Owner Readiness Report

CLEVELAND, OH, UNITED STATES, September 9, 2025 /EINPresswire.com/ -- Baby Boomers, Generation X, and Millennials view and approach exit planning in different ways. Those differences—which have a large impact on both entrepreneurship and the exit planning advisory profession—are highlighted in the [Generational State of Owner Readiness Report](#) from the [Exit Planning Institute®](#) (EPI). A deep-dive generational analysis of EPI's [2023 National State of Owner Readiness study](#), the report provides critical insights for owners and advisors about the gaps in exit planning education and action among each generation.

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Scott Snider, President of The Exit Planning Institute

Key findings from this report reveal significant differences in how each group approaches exit planning, with some engaging more intentionally and effectively than others. 75% of business owners want to exit their business within the next 10 years. However, the data shows that readiness varies among generations, with Baby Boomers being the least prepared. Specifically, the report examines readiness

among all three legs of the stool in the Value Acceleration Methodology™: personal, financial, and business readiness.

“Exit is all around us. It’s time to broaden your horizons, focus on what’s next, develop a personal plan, get an estate plan and will completed, and focus on the future of your company and life,” says Scott Snider, President of EPI. “Exit planning isn’t just about the end of your career, it’s about driving value in your business now to blend your personal, financial, and business goals.”

The Generational State of Owner Readiness Report is both a wake-up call and a guide. This report provides actionable insights for owners and advisors to better understand generational attitudes, desires, and strategies.

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Download the full Generational State of Owner Readiness Report at <https://exit-planning-institute.org/state-of-owner-readiness>.

About Exit Planning Institute

Exit Planning Institute (EPI) was formed in 2005 to serve professional business advisors' educational and resource needs. Its Certified Exit Planning Advisor (CEPA®) credential program is the most widely endorsed professional exit planning program in the world, providing advisors with the content, tools, and training needed to engage business owners and become their most valued advisors. For more information, visit exit-planning-institute.org.

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