



California Hosts The Exit Planning Institute's First Regional Summit

COSTA MESA, CA, UNITED STATES, October 8, 2025 /EINPresswire.com/ -- The Exit Planning Institute® (EPI) is teaming up with The Gathering and Fiduciary Attorney Summit to produce the first EPI Regional Summit, taking place from October 26-27, 2025, at the Westin – South Coast Plaza in Costa Mesa, California.

This two-day event, focused on business succession and exit planning, represents a powerful collaboration between EPI and the Southern California Institute (SCI), uniting legal, tax, wealth, and exit planning professionals.

The Regional Summit will feature a dynamic speaker lineup, including Joe Seetoo, EPI's 2025 Peter Christman Exit Planner of the Year, and EPI chapter leadership Joseph Strazzeri, Shelley Lightfoot, Melissa Silverman, and other industry professionals.

Attendees will have the opportunity to network with prior Fiduciary Attorney Summit and Gathering attendees and [EPI Chapter Members](#). Additionally, attendees will gain perspectives directly from exited owners while learning about practice building, business planning strategies, Bitcoin innovation, counseling awareness on motive and misunderstanding, business transition tools, and more.

Registration is open to prior Fiduciary Attorney Summit attendees, The Gathering attendees, EPI California chapter members, and collaborative partners. Learn more and register for this one-of-a-kind event at <https://scinstitute.org/gathering-2025/>.

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.

About Southern California Institute

Southern California Institute (SCI) was formed in 2002 with the idea to "Educate to Motivate" – bringing advisors from different financial, legal, and accounting disciplines together to learn from each other. Though much of the content SCI offers is technical in nature, what makes it

unique is that all programs are geared toward providing language and tools that help advisors attract, engage, and work with their favorite clients.

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