

Exit Planning Advisors Embrace AI at Extraordinary Rate, New Survey Data Shows

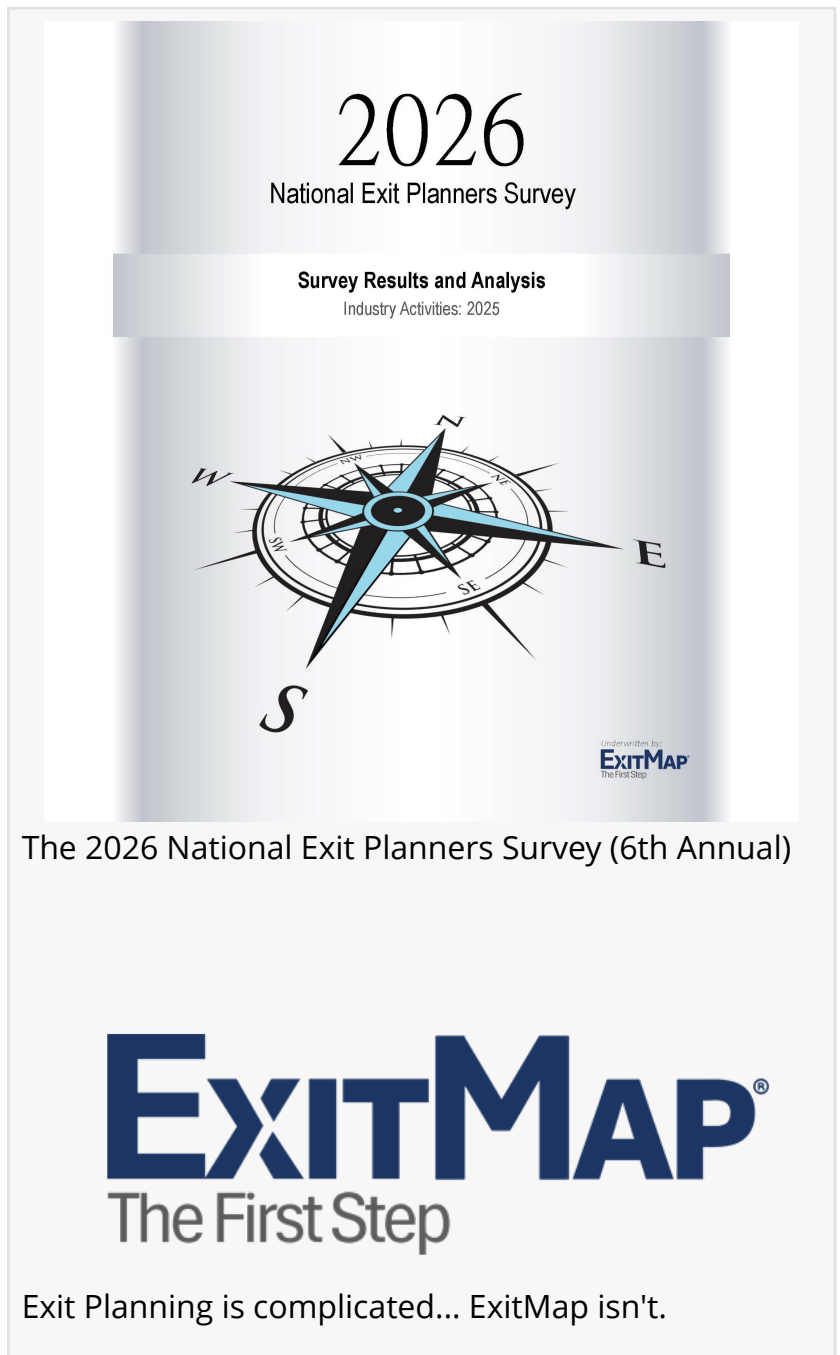
Nearly 95% of Exit Planning Professionals Now Use AI Tools; Majority on Paid Professional Platforms

SAN ANTONIO, TX, UNITED STATES, April 2, 2026 /EINPresswire.com/ -- Ahead of the April 7 release of the 2026 National Exit Planners Survey, organizers are previewing one of the report's most striking findings: artificial intelligence has moved from experimentation to standard practice across the exit planning profession with remarkable speed.

According to the survey — which gathered responses from 405 practitioners across 47 U.S. states and six countries — 94.8% of exit planning advisors now use AI tools in some capacity. More significantly, the majority are not relying on free consumer tools. Seventy percent of respondents are using paid, professional-grade AI platforms, either personally subscribed, firm-provided, or both.

The applications are moving well beyond administrative tasks.

Informational research (76.5%) and copy drafting (67.2%) lead adoption, but a substantial share of advisors are now deploying AI for strategic planning (30.6%), financial analysis (24.2%), and business process management (19.8%) — functions that represent the substantive, value-creating core of exit planning advisory work.



The image shows the cover of the 2026 National Exit Planners Survey report. At the top, the year '2026' is prominently displayed in a large, dark font, with 'National Exit Planners Survey' written below it in a smaller font. A horizontal grey band across the middle contains the text 'Survey Results and Analysis' and 'Industry Activities: 2025'. Below this band is a detailed illustration of a compass rose with cardinal and intercardinal directions labeled. In the bottom right corner of the cover, there is a small logo that reads 'Underwritten by EXITMAP The First Step'. Below the cover image, the text 'The 2026 National Exit Planners Survey (6th Annual)' is centered. At the bottom of the complex block, the 'EXITMAP' logo is displayed in a large, bold, blue font, with the tagline 'The First Step' underneath it. Below the logo, the slogan 'Exit Planning is complicated... ExitMap isn't.' is written in a smaller, dark font.

The survey also reveals a meaningful correlation between AI sophistication and earnings. Among advisors billing over \$250,000 annually, paid AI users dominate, and the most advanced users — those with access to both personal and firm-provided platforms — show the highest rates of follow-on advisory work from exit planning engagements.

"AI is no longer a differentiator in this profession — it is the baseline," said John F. Dini, the CEO of ExitMap. "The advisors who will lead exit planning over the next decade will be those who master AI-augmented workflows while maintaining the human judgment that complex business transitions demand."



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

AI tools and automation ranked fourth among desired marketing investments when advisors were asked where they would direct additional resources, confirming that the profession views AI as a growth driver, not merely a productivity tool.

The complete findings, including a full breakdown of AI usage by credential group, billing tier, and caseload size, will be available in the 2026 National Exit Planners Survey Report at <https://exitplannersurvey.com/> beginning April 7, 2026.

About ExitMap

ExitMap is a system of proprietary software tools designed to assist advisors in preparing their clients for a business transition. Studies show that a majority of former owners are dissatisfied due to a lack of activity, identity or purpose. ExitMap interviews and exercises help owners determine their goals, personal vision, and the actions needed to achieve their objectives. Since 2021, ExitMap has conducted the only annual survey of professionals in the field.

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