

2026 National Exit Planners Survey Released Profession Shows Signs of Maturation as Boomer Business Transfers Accelerate

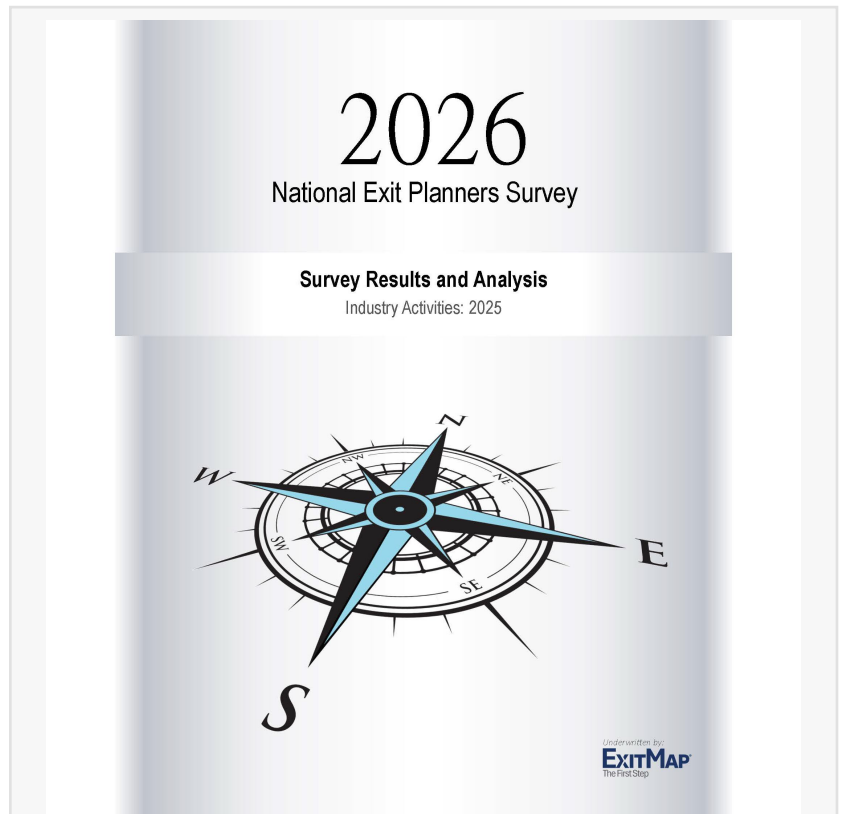
Six-Year Data Series Documents Rising Fees, Declining Newcomer Surge, and Shifting Practice Economics

SAN ANTONIO, TX, UNITED STATES, April 7, 2026 /EINPresswire.com/ -- The 2026 National Exit Planners Survey is now available, offering the profession's most comprehensive annual analysis of practice development, revenue trends, technology adoption, and advisor demographics. The report, based on responses from 405 practitioners across 47 U.S. states and six countries, draws on six consecutive years of survey data to document where the exit planning profession has been — and where it is heading.

Key findings include:

The share of advisors charging fees for exit planning services reached 76.5% in 2026, the highest in the survey's history and up from 69.9% the prior year. Fee-based advisors reported average annual billings for exit planning services of approximately \$81,000, with 23.2% billing over \$100,000 and 10.0% exceeding \$250,000.

The proportion of practitioners with fewer than three years of experience fell sharply from 49.7%



The 2026 National Exit Planners Survey (6th Annual)

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to 37.3%, reversing a multi-year surge and suggesting the profession is entering a period of consolidation and retention rather than pure growth. Correspondingly, the cohort with more than ten years of experience grew to 20.7%, its strongest showing since 2022.

Phase One engagement pricing emerged as the strongest single predictor of annual billing outcomes in this year's cross-analysis. Advisors pricing initial engagements above \$10,000 billed over \$100,000 annually at a rate more than four times higher than those charging under \$5,000.



Artificial intelligence adoption reached near-saturation, with 94.8% of respondents using AI tools in some capacity and 70% relying on paid professional platforms. AI is now deployed across research, strategic planning, financial analysis, and marketing — well beyond the administrative functions where adoption began.



The economics are strengthening, practitioners are more experienced, and tools are more sophisticated. The question is no longer whether exit planning is viable — it is who will lead it."

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

Referrals from other professionals (42.5%) and personal networking (31.4%) remain the dominant sources of new clients, reinforcing that exit planning continues to be built on professional relationships rather than marketing campaigns.

"The 2026 survey documents a profession that is growing up," said John F. Dini, the CEO of ExitMap. "The economics are strengthening, the practitioners are becoming more

experienced, and the tools — particularly AI — are becoming more sophisticated. The question is no longer whether exit planning is a viable specialty. It is who will lead it through the largest business ownership transition in American history."

The 2026 National Exit Planners Survey Report is available today, April 7, 2026 at <https://exitplannerssurvey.com/>.

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.

John F, Dini

ExitMap® LLC

+1 800-653-5405

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