



Exit Planning Institute Launches Washington, D.C. Chapter

Membership to include DC-area business owners and exit planning professionals looking to network and collaborate on exit planning strategies

WASHINGTON, D.C., DC, UNITED STATES, April 15, 2026 /EINPresswire.com/ -- Exit Planning Institute®(EPI), the leading authority on exit planning for advisors, business consultants and business owners, today announced the launch of its Washington, D.C. chapter. The EPI Chapter Network consists of 28 groups led by local advisors and exit planning professionals, and the chapters serve as a hub for advisors, leaders, and experts to network, earn continuing education credits, and collaborate on exit planning projects.

“The foundation of EPI Washington, D.C. builds on an already strong network of exit planning professionals based in and around our nation’s capital,” said, Christopher Kaiser, President of the EPI Washington, D.C. “Our goal is to create a dynamic community where advisors can collaborate, learn from one another, and elevate how we help business owners plan successful transitions.”

The Washington, D.C. chapter will hold its inaugural meeting and launch event from 12:00 p.m. to 2:00 p.m. on Thursday, May 7th at the Tower Club Tysons, located at 8000 Towers Crescent Dr Suite 1700, Vienna, VA. EPI President Scott Snider will join the celebration, presenting a talk titled “Exit Planning is Not What You Think.” Local business advisors such as financial planners, wealth advisors, CPAs, lawyers, and business owners are invited to attend.

The Washington, D.C. chapter will host in-person meetings on the second Tuesday of each month at Valo Park, located at 7950 Jones Branch Drive, McLean, VA. Each meeting will include a deep dive into an exit planning topic. Some upcoming meetings include:

June 9 – Deep Dive into the Value Acceleration Methodology Panel

July 7 – EPI Washington Chapter Social Event

August 11 – Opening Conversations with Business Owners

The Washington, D.C. chapter will be led by a group of experienced exit planning professionals including:

President: Christopher Kaiser, CEPA®, CRPS™

Vice President: Tim Kirby, CEPA®, ChFC®

Marketing & Communications Co-Chair: Joseph Mjelde, CEPA®, CRPS™

Marketing & Communications Co-Chair: Rod Volz, CEPA®, MBA

Marketing & Communications Co-Chair: Dale Tuttle, CEPA®

Education Chair: Guillermo Birmingham, CEPA®, CPA

Sponsorship Chair: Elizabeth Shea, CEPA®

Membership Co-Chair: Chris Roth, CPA

Membership Co-Chair: Jack Kress, CEPA®, AAMS

If you are an owner or exit planning professional interested in attending the launch event, you can register here. Learn more about the Washington, D.C. chapter on its home page.

About The 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.

About EPI Chapters

The EPI Chapter network creates a forum for local professional advisors to collaborate on their unique community needs. Its goals include developing educational programs for business owners to prepare for successful exits, promoting best practices in exit planning, and advocating for advisors' interests in this field. As natural collaborators, these chapters forge strong bonds with influential organizations, including local media outlets and business journals, colleges and universities, major financial/professional services brands, and reputable member associations like AICPA, AM&AA, ACG, NACVA, and more. For more information, visit exit-planning-institute.org/chapters.

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