



Exit Planning Institute Launches New 'CEPA® Immersion Events' to Elevate Advisor Impact with Business Owners

A new virtual training series empowering CEPA® professionals with proven strategies to deepen client relationships and drive business owner engagement

CLEVELAND, OH, UNITED STATES, May 6, 2026 /EINPresswire.com/ -- The Exit Planning Institute® (EPI) announced the launch of its newest virtual training series, CEPA® Immersion Events, designed exclusively for Certified Exit Planning Advisors (CEPA®) seeking to deepen their impact with business owner clients and elevate their advisory practices.

Kicking off on May 12, these interactive, three-hour sessions will be held from 11:00 a.m. to 2:00 p.m. EST via Zoom and are priced at \$99 per event. The series delivers actionable insights, practical frameworks, and real-world strategies tailored specifically for CEPA professionals.

The sessions will be led by Casey Clark, CEO of Cultivate Advisors, who brings firsthand experience from working with more than 3,000 business owners over the past decade. Clark will share the proven tools, playbooks, and engagement frameworks his firm has used to successfully guide entrepreneurs through growth and exit planning—customized to fit CEPA professionals.

“CEPA® Immersion Events are designed to bridge the gap between certification and execution,” said a spokesperson for the Exit Planning Institute. “Advisors will walk away with practical strategies they can immediately apply to build stronger relationships, uncover growth opportunities, and position themselves as indispensable partners in their clients’ journeys.”

Participants will also gain insights into building deeper, more meaningful client relationships, engaging business owners with effective, value-driven conversations, positioning themselves as trusted, long-term strategic advisors, and implementing repeatable processes that drive sustained engagement and results.

These sessions are ideal for CEPA professionals looking to refine their advisory approach, strengthen client engagement, and unlock new opportunities within their practice.

Registration is now open. To learn more or reserve your spot, visit CEPAImmersionEvents.com.

About the Exit Planning Institute

The Exit Planning Institute is the leading professional organization dedicated to educating and training advisors who work with business owners on exit planning. Through its CEPA® program and ongoing education, EPI equips advisors with the tools and frameworks needed to help business owners maximize business value and achieve successful transitions.

Media Contact:

Exit Planning Institute

Peggy Kachevas

pkachevas@exit-planning-institute.org

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pkachevas@exit-planning-institute.org

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