The Value of a CEPA® to a Business Owner

What is a CEPA®?

A **Certified Exit Planning Advisor (CEPA®)** is a credentialed professional trained to help business owners **strategically plan and execute a successful exit**—whether through a sale, succession, or other transition.

Why It Matters

Most business owners have **80–90% of their net worth** tied up in their business, yet:

- **Only 30%** of small businesses that go to market actually sell [1].
- **73%** of privately held companies plan to transition ownership within the next decade—representing a **$14 trillion opportunity** [2].
- **49%** of owners plan to exit within 5 years, but **78% lack a formal transition team** [2].
- **70%** of owners rely on their business income to maintain their lifestyle post-exit [2].

A CEPA helps you **maximize value, minimize risk, and exit on your terms**.

What a CEPA Brings to the Table

✅ **Holistic Planning**
CEPA advisors integrate **business, personal, and financial goals** into one cohesive strategy.

✅ **Value Acceleration**
They identify and implement strategies to **increase the transferable value** of your business before a transition.

✅ **Team Coordination**
CEPA professionals collaborate with your CPA, attorney, and other advisors to ensure a **seamless process**.

✅ **Exit Readiness Assessment**
They evaluate both your **business readiness** and **personal readiness** to exit—often years in advance.

✅ **Customized Exit Options**
Whether you're considering a **third-party sale, internal succession, ESOP, or recapitalization**, a CEPA helps you choose the right path.

When Should You Engage a CEPA?

Now. Exit planning is not a one-time event—it's a **proactive, long-term strategy**. The earlier you start, the more options and value you'll have when the time comes.

Ready to Start the Conversation?

Let's explore how exit planning can secure your legacy, protect your wealth, and give you peace of mind.

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References

[1] Succession planning statistics in 2025: preserving a legacy

[2] 20 Key Business Owner Statistics on Exits & Succession