CEPA®
Certified Exit Planning Advisor

Parsec Financial Senior Financial Advisor Daniel Johnson Receives CEPA Designation and Joins International Community of Business Advisors with the Exit Planning Institute

July 1, 2020 – Parsec Financial is proud to announce that Daniel Johnson earned the Certified Exit Planning Advisor (CEPA) designation after completing the Exit Planning Institute's intensive 4-day executive MBA-style program. Daniel Johnson joins an elite group of business advisors who have received this designation and are a part of the Exit Planning Institute's international community of CEPAs. The CEPA program is the most widely accepted and endorsed professional exit planning program in the world.

About the CEPA Program

The Certified Exit Planning Advisor program was specifically designed for business advisors who work closely with owners of privately held companies. The organizing principle of the program is Master Planning, the alignment of the three legs of the stool (business, personal, financial), which is executed through the implementation of a process called the Value Acceleration Methodology™. Using an executive MBA-style format, the program includes a combination of lectures, group discussions, case studies and individual exercises to introduce participants to these concepts and to reinforce skills. The program is taught by the Exit Planning Institute's faculty of advisors, who are all sought after subject matter experts and authors.

To receive the CEPA designation, Daniel Johnson completed the rigorous 4-day program that involved approximately one hundred hours of pre-course study, thirty hours of classroom instruction, and the successful completion of a 3-hour proctored exam.

A Certified Exit Planning Advisor can help an owner:

- Understand the value of their business, both tangible and intangible
- Determine how ready and attractive their company is currently
- Identify the owner's three gaps (value, wealth, profit)
- Identify the Range of Value of an owner's company. What is it worth today and what is it potentially worth
- Understand their exit options and how they apply to their company and exit goals
- Better understand their personal vision and personal financial needs
- Align their business, personal and financial goals

- Create, deliver and maintain 90-day action plans helping an owner de risk their business and grow value
- Bring the advisory team together, and the owner's internal team together, to work towards common goals and better collaborate

XXX

Media Contact:
Tracy Clark, Head of Marketing
tclark@parsecfinancial.com
336-207-5956

About Parsec Financial: Parsec Financial is a fee-only registered investment advisor with $2.5 billion in assets under management as of March 31, 2020. Parsec provides investment management, financial planning, tax planning, trust services and business retirement services to more than 1,700 individuals and businesses in six offices across North Carolina.