



# EXIT PLANNING JOURNEY FOR CLIENTS

WEALTH ADVISOR ACTIONS

- 1 3 Shocking Stats Conversation
- 2 Exit Planning Education Invitations
- 3 Email Introduction to our team

SALES PROCESS

- 4 Exit Clarity Call
- 5 Exit Strategy Call

THE WORK

- 6 Exit Clarity Engagement
- 7 90-Day Sprints





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## SAMPLE INTRODUCTION

Micah is a Business Exit Advisor (CEPA) to extraordinary business owners generating 1MM+ in annual profits. His team helps business owners increase company valuations to fund personal goals, craft seamless succession plans, and optimize growth strategies to drive best-in-class profits and valuations. Their work enables business owners to get clear on their future plans so that all of the actions they are taking today help them get there.

