

# Current Trends in Exit Planning

*Market and EPI Community Update*





# Scott Snider

President, Exit Planning Institute

- Contributor for Forbes Business Council
- Serial Entrepreneur & Family Business Owner
- Value Creator/Growth Strategist
- Operating Partner of Snider Premier Growth

- 51% owned by Baby Boomers
- 43% owned by people 37-57 years old
- 6% owned by people 36 and younger
- Exit motivators: age, health, economic outlook, and market conditions
- Most attractive companies: employee retention and use of technology
- Deal killers: price, terms, and eroding financials

- Big 10 year run for the exit planning profession
- 53% wanted to sell within 5 years (Colorado S00R)
- “Boomerang” exits from Baby Boomers
- 32% said buy/invest in another business 30% said consult (Colorado S00R)
- Stronger family companies
- Stronger more empowered management teams
- More government support or programming

- 33% said they have high attention spent on exit
- 67% said they spent little to no time on exit
- Why? 1) too busy growing, 2) important not urgent, 3) don't know how to start
- 56% said they knew/understood what exit planning is
- 40% have sought outside advice on exit
- 78% have established no formal team
- 14% trusted advisor “other” 1) no one, 2) team, 3) M&A advisor

A background image showing a group of business professionals in a meeting, viewed from above. They are gathered around a table, looking at documents and laptops. The image is semi-transparent and serves as a backdrop for the title.

# SUCCESSFUL TO SIGNIFICANT

A significant company is one that is valuable, transferrable, ready, and attractive at any point. While the business owner's business, personal, and financial goals are aligned.

# EPI Community

*Thought Leaders Driving the Profession*

- 4,000 CEPAs
- 10,000 advisors
- 700+ Summit
- 30+ Chapters
- EPI Academy
- WTD 2.0 Launch

- **Experiences.** Transformational educational experiences delivered to the owner
- **People.** Being a connector for the owner and each other
- **Innovation.** Hybrids exits, bringing family together, creating value and balance

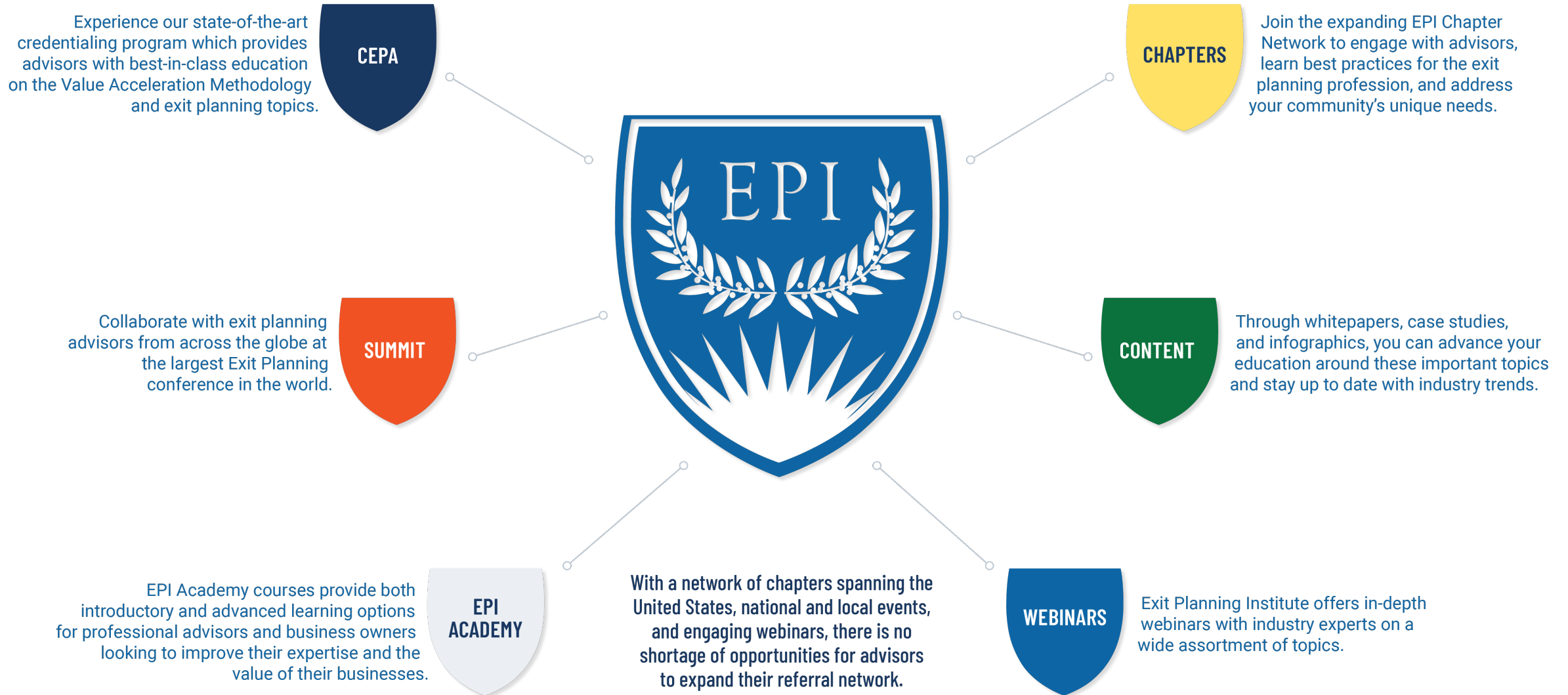


- The Exit Planning Team
- Expansion of Value Acceleration Knowledge
- Change in Language and Overall Approach with Owners

# New for 2023

## *Advancement Opportunities*

- Summit
- Exit is Now Podcast
- Think Tanks
- Chapters
- EPI Academy
- Ecosystem



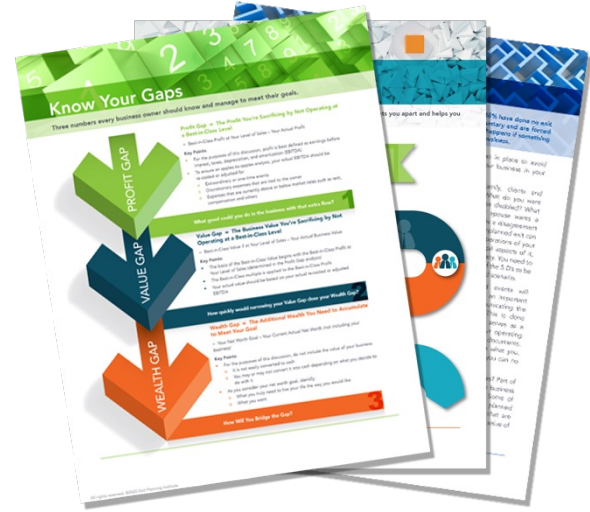
## Research



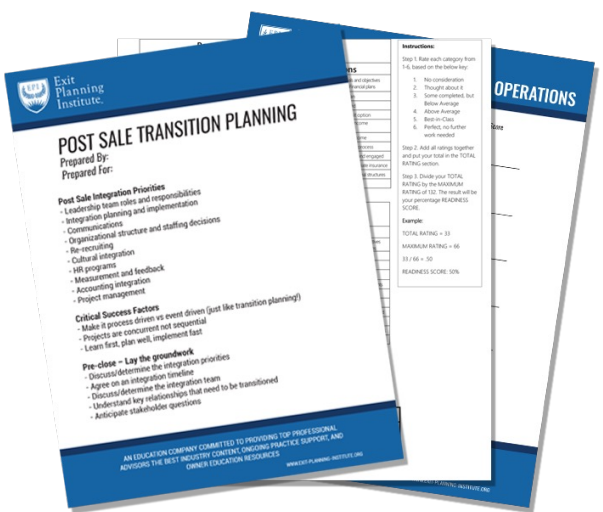
## Archived Webinars



## One Pagers



## Assessment Tools



## Infographics



The background of the slide is a blue-tinted photograph of a person's hands writing in a spiral notebook. The person is wearing a white shirt. The image is slightly blurred, creating a professional and focused atmosphere.

**THANK YOU**