

AGENDA

EXIT PLANNING
SUMMIT
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SATURDAY - APRIL 18, 2026

8:00 AM - 1:00 PM	Golf Outing Additional Paid Experience <i>Sponsored by Blue Value Advisors</i>
5:00 PM - 7:00 PM	Partners and Pours VIP Social VIP Only Event

SUNDAY - APRIL 19, 2026

7:00 AM - 11:30 AM	Mastering the Triggering Event Workshop Additional Paid Experience	Christopher Snider, CEPA®
	Women in Exit Planning Symposium Additional Paid Experience <i>Sponsored by RBC Wealth Management</i>	Tina Corner Stolz, CEPA®
	Advanced Tax Planning Workshop Additional Paid Experience	Joe Strazzeri, CEPA®
	NEW! Shine: How to Maximize Your Impact and Inner Peace Workshop Additional Paid Experience	Philip Pfeifer
	NEW! CEPA Immersion: Turning Your CEPA into a Growth Engine Workshop - Financial Advisors Only <i>(Limited Seats Available)</i> Additional Experience	Casey Clark
8:30 AM - 11:30 AM	Chapter President Circle Meeting <i>Sponsored by City National Rochdale</i>	
10:30 AM - 7:00 PM	Registration Open	
	Exhibits Open	
11:30 AM - 12:45 PM	Excellence in Exit Planning Awards Lunch	Joe Seetoo, CEPA® Scott Snider Christopher Snider, CEPA®
12:45 PM - 1:00 PM	Break	
1:00 PM - 2:00 PM	Setting the Table: Language and Tools That Unlock the Process with Business Owners	Scott Snider
2:00 PM - 2:15 PM	Break	
2:15 PM - 3:45 PM	Tools in Action: How Solution Providers Strengthen the CEPA Team	Scott Snider
3:45 PM - 4:00 PM	Break	
4:00 PM - 5:30 PM	From Language to Tools: Collaborating for Owner Success	Scott Snider
5:30 PM - 7:00 PM	Welcome Social	

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**EXIT PLANNING
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MONDAY - APRIL 20, 2026

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7:00 AM - 5:30 PM	Registration Open	
7:00 AM - 5:30 PM	Exhibits Open	
7:00 AM - 8:15 AM	Breakfast	
8:00 AM - 8:30 AM	Opening Remarks	Joe Seetoo, CEPA® Scott Snider
8:30 AM - 9:30 AM	The Champion's Creed Keynote	Ben Utecht
9:30 AM - 10:00 AM	Break	
BREAKOUT SESSIONS	Registration Open During this breakout timeframe, attendees can choose from three session formats: an education-focused lecture for structured learning, or two case studies that dive into real-world scenarios and practical applications.	
10:00 AM - 11:30 AM	Building a Successful Multi Million Dollar Exit Planning Practice Breakout: Case Study	Craig West, CEPA®
	Bridging the Value Gap: Three Live Valuation Case Studies for Exit-Planning Advisors Breakout: Case Study	Shina Culberson, CEPA®
	Exit-Ready Branding: Boost Business Value + Prepare Founders for What's Next Breakout: Lecture Style	Laura Beauparlant
11:30 AM - 1:30 PM	Lunch/Exhibits/Demo Lounge	
BREAKOUT SESSIONS	During this breakout timeframe, attendees can select from a case study that showcases real-world strategies in action, or two dynamic panel discussions for a range of perspectives and interactive dialogue.	
1:30 PM - 3:00 PM	Integrating the Language of Value Acceleration: Driving Owner Engagement and Advisor Collaboration Breakout: Panel Discussion	Jesse Abercrombie, CEPA® Renee Russo, CEPA® Joe Seetoo, CEPA® Scott Snider
	Navigating Complex Dynamics in Family Business Breakout: Panel Discussion	Judi Cunningham, CEPA® Vivek Sarin, CEPA® Amy Wirtz, CEPA®
	Protecting Business Value: Why Buy-Sell Agreements Matter for Every Business Advisor Breakout: Case Study	Jacqueline Kaltz-Coulombe, CEPA® Tim Oliver, CEPA®
3:00 PM - 6:00 PM	NEW! Summit Exploration Time Explore a brand-new Exploration Time at the close of Monday, designed from attendee feedback to help you connect, discover, and recharge.	
	Author Showcase <i>Sponsored by Octain Growth Systems, LLC</i>	

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TUESDAY - APRIL 21, 2026

7:00 AM - 3:45 PM	Registration Open	
7:00 AM - 2:45 PM	Exhibits Open	
7:00 AM - 8:00 AM	Sunrise Table Talks <i>Additional Experience</i>	
7:30 AM - 8:30 AM	Breakfast & Live Acoustic Music	
8:30 AM - 9:30 AM	The Most Overlooked Leg of the Stool: Personal Planning as the Key to Exit Success	Cara Gray, CEPA® Susan Latremaille, CEPA® Jerome Myers, CEPA® Marianne Oehser, CEPA® Scott Snider
9:30 AM - 10:00 AM	Break	
BREAKOUT SESSIONS	During this breakout timeframe, attendees can choose between three engaging panel discussions offering diverse perspectives.	
10:00 AM - 11:30 AM	Center Of Influence Marketing for Professionals Expert Panel Discussion and Q&A Breakout: Panel Discussion	Michael Garrison, CEPA® Adam Koos, CEPA® Tina Corner Stolz, CEPA®
	From Theory to Practice: Implementing the Value Acceleration Methodology Breakout: Panel Discussion	Gordon Bell, CEPA® Jessica Fialkovich, CEPA® Justin Goodbread, CEPA® Julie Keyes, CEPA®
	A Deeper Dive Into Advanced Tax Planning: Impacts on the Exit and Transition Breakout: Panel Discussion	Brad Barros, CEPA® Tom Handler Michael King Joe Strazzeri, CEPA®
11:30 AM - 1:00 PM	Lunch/Live Podcast/Exhibits/Demo Lounge	
BREAKOUT SESSIONS	During this breakout timeframe, attendees can opt for an education-focused lecture to build foundational knowledge, or choose from two case studies that translate concepts into real-world applications and practical insights.	
1:00 PM - 2:30 PM	Narrow Framing and the Value Acceleration Methodology Breakout: Lecture Style	Ken Haman Trace Udall, CEPA®
	Earn Your Seat at the Owner's Table: How Wealth Advisors Win with Value Acceleration Breakout: Case Study	Greg Maddox, CEPA®
	Inside the Mind of an Investment Banker: How Deals Are Shaped by Good Advice, Bad Advice, or No Advice Breakout: Case Study	Scott Mashuda Jaclyn Ring
2:30 PM - 2:45 PM	Break	
2:45 PM - 3:45 PM	Legendary Leadership: The Toughest Choice—The Mask or the Mirror Keynote	Tommy Breedlove
4:00 PM - 5:30 PM	After Party Social	