

EO ExitPro 101 will help you present employee ownership as a profitable strategy for your clients

Are you a business advisor with clients nearing retirement? Are your clients looking to exit on their own terms? Are they looking for an exit strategy that benefits them and their employees?

If you have small business owner clients who need exit option recommendations, our EO ExitPro course can help. EO ExitPro 101 is an online, on-demand course that offers convenient continuing education opportunities and a framework for increasing practice revenue and client retention.

Project Equity's EO ExitPro 101 course will:

- Equip you with the knowledge and tools to effectively serve in quarterback, point person or referral roles for employee ownership exit transitions for your clients
 - Help you and your clients understand employee ownership profitability
 - Provide you with subject matter expertise from fellow small business advisors in the industry
 - Open up additional revenue opportunities by allowing you to offer EO exit planning services to your local business community
 - Count toward your CE credit (2 hours for NASBA and CFP, 1.5 hours for EPI-CEPA and BEI)
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Course description

The goal of this introductory course is to introduce exit planners and business advisors to the many advantages of being informed and ready to recommend employee ownership (EO) exit options for their small business clients when appropriate.

We hope that this course will inspire and activate business advisors and service providers to build demand for employee ownership, while simultaneously increase the “supply” of advisors that can execute on one or more pieces of EO service needs. We are starting with training and certification as the beginning phases of market activation and will be continuing to assess whether these alone will achieve the overarching goal, or whether other services and support may be needed.

Project Equity’s learning products offer convenient CPE opportunities for small business service providers and a framework for increased EO awareness, practice revenue, and client retention.

Learning objectives

Upon completion of this self-study course, participants will be able to:

- Recognize the features, benefits, advantages, and limitations of each type of broad-based employee ownership types including employee stock ownership plans (ESOPs), worker cooperatives or employee ownership trusts (EOTs)
 - Select the most appropriate form of broad-based employee ownership for each small business owner client considering their retirement, exit or succession goals
 - Identify the small business advisor specialist role types and timelines required to facilitate an employee ownership transition for their small business owner clients
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