

STACY KUXHAUSEN CEPA CASE STUDY



TITLE

Owner, CEO

COMPANY

IGX LLC

CEPA SINCE

2022

The Exit Planning Institute community is comprised of a large variety of professional advisors from across the globe. There are over 4,000 Certified Exit Planning Advisors in the marketplace currently helping business owners build value in their companies prior to exiting.

What is a CEPA™?

The Certified Exit Planning Advisor (CEPA) credential is for professional advisors who want to effectively engage more business owners, build value within their business, and exit on their own terms. Through the process of Exit Planning, utilizing the Value Acceleration Methodology, owners can build more valuable companies, have stronger personal financial plans, and align their personal goals. Earning the CEPA credential expands your expertise and enhances your ability to engage business owners and conduct value-added conversations around growth and exit.

Learn how CEPA, Stacy Kuxhausen is utilizing her exit planning expertise in her practice and how the CEPA credential has helped to expand her practice through thought leadership in the exit planning space.

Meet Stacy Kuxhausen

Stacy Kuxhausen, the owner and founder of IGX LLC, helps owners of privately held businesses increase their business value, reduce their pain points, and become exit ready for now or years in the future. Stacy has built, acquired, and sold her own businesses, and enjoys helping business owners reach their vision of success.

What Inspired Stacy to Earn Her CEPA Credential?

With over 25 years of experience working with business owners as a CPA, Stacy worked with a large variety of owners. She explains, “I saw business owners work so hard all their lives, yet many didn’t have a sellable business or they left money on the table during the transaction. Others sold their business and then were lost.”

However, the owners who worked with exit planning advisors had different outcomes. They were more prepared for their life after their business and were building the value of their business prior to its sale.

The main inspiration for earning her CEPA credential was the impact it would have on her business owner clients. Stacy shares, “It’s a way to show owners we are serious about our role in helping them. We are committed to continuing our education to better serve them. CEPAs and

the EPI community as a whole is a group of like-minded professionals all working together for the good of the business owner.”

Stacy continues, “Today, this work is my full-time focus, helping business owners understand how they can create valuable, sellable businesses and be excited about the next adventure in their lives. This process helps them understand their business can be a tool to help them live and do the things they want after they exit, or their business can be a legacy they can leave for their kids, their community, or the world. Many times, they aren’t aware they have options.”

Completing the CEPA Program

The CEPA program provides advisors with a holistic view of exit planning. The training covers exit options, estate planning, exit planning deliverables, team roles, and more. Stacy shares that she enjoyed the full week of exit planning content provided in the CEPA credentialing program. Additionally, the large breadth of EPI faculty offered different perspectives on exit planning topics and grew Stacy’s professional network.

She explains, “It takes a team of professionals to work on an owner’s exit. The CEPA program highlighted each advisor’s role in a successful process. If you aren’t familiar with all the roles the other professionals play in the process, this program is a good introduction. Meeting CEPAs that handle other areas of the process is helpful.”

Practice Improvements Since Earning The CEPA

As a Value Advisor, Stacy coordinates, facilitates, and keeps the exit planning engagement moving forward. She shares, “Other professionals bring me in when the owner needs or wants to increase the business value or get assistance with the entire process. My work combines educating, problem-solving, strategic planning, and holding people accountable.”

Stacy recognizes the large emerging market of millennial and Generation X business owners in need of exit planning advice. There is a shift towards younger business owners as the baby boomer owners continue to exit their businesses. Stacy states this market is a huge opportunity for her in terms of educating owners.

She explains, “Millennials and Gen X owners are getting offers, but often those offers fall through because they didn’t pass the due diligence process. That experience gets them focused on what needs to be done differently in their business now and for the future.”

After earning her CEPA credential, Stacy has the tools and resources to assist the younger generations of owners in successfully passing the due diligence process. By implementing a holistic exit planning strategy, her practice has grown significantly across all generations.

How to Utilize Your CEPA Effectively

After earning their CEPA credential, many advisors ask the following questions:

- == How do I monetize this?
- == What is the best market for me?
- == How do I implement this knowledge into my practice?
- == How do I share my new credential with my network?

These answers can vary depending on individual practice regulations and advisor type. Some advisors are unable to charge explicitly for “exit planning” services, but the holistic education provided in their CEPA program can be utilized to offer more comprehensive financial advice.

Stacy charges a flat fee for the triggering event engagement as well as ongoing coaching and training as needed. For explicit “exit planning” services, she charges either a flat fee or an hourly fee depending on the client.

Stacy recommends CEPAs take the following steps when beginning to implement their CEPA education into their practice.



Begin the exit planning conversation with existing clients



Package your services based on the work and needs of your initial clients



Build a community by seeking out other CEPA professionals



Position yourself as a thought leader by speaking at events to educate your audience and other professionals

Are You Interested in Becoming a CEPA?

Stacy strongly recommends the CEPA program for other advisors looking to expand their knowledge on exit planning. She shares, "It's a great investment. What you learn from this program provides value to your client and to the exit planning team. This program provides a great overview of the entire process and what issues need to be addressed with the client. Once we better understand the whole process and what issues need to be addressed, we can figure out where we fit best to assist our clients."

Stacy continues, "I feel a sense of relief when my client brings one of their professionals to the table and I see that they are a CEPA. The process is smoother and I feel like we can bring additional value to the client beyond our individual roles. We are stronger as a team."

The Certified Exit Planning Advisor credential is for those advisors who want to expand their expertise and differentiate themselves from the competition.

- Differentiate yourself from the competition
- Gain better access to business owners
- Become more engaged on a business owner's advisory team
- Have deeper and more holistic conversations with business owners
- Grow your referral network of professional advisors
- Access hundreds of marketing and business development tools tailored for owners

Learn more about the CEPA program and become your client's Most Valued Advisor today!

www.EarnCEPA.com



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