XPX South FLORIDA
EXIT PLANNING EXCHANGE

Overview

The Exit Planning Exchange is an association of advisors who provide education, professionalism and principles to the Lower middle market. Our Chapter is a local nonprofit that serves advisors who work with business owners in all stages of the private company life cycle: business value growth, business value transfer, and owner life and legacy.

The Basics

Our 560+ members are experienced advisors who:

- Work directly with owners/senior managers of companies with $5 to $100 million in revenues
- Have expertise in one of our 12 professions
- Demonstrate the XPX Advisor Principles in their work

12 Member Professions

- Accountants
- Attorneys
- Bankers
- Coaches
- Consultants
- Insurance Providers
- Investors
- M&A Intermediaries
- Non-profits
- Valuators
- Virtual Managers
- Wealth Planner

What to Expect

XPX provides members with a unique combination of:

- Resources – for continuous learning about the private company life cycle
- Relationships – to ensure you know (and are known to) the best advisors in your market
- Visibility – so you stand out in the market

XPX Advisor Principles

1. Work collaboratively
2. Put the client first
3. Think long term
4. Consider the human angle
5. Always be learning

Chapters

Atlanta, Boston, Hartford, Fairfield, Long Island, New York, New Jersey, Philadelphia, Maryland, DC Metro, Chicago, San Antonio and South Florida with more in development in the U.S. and abroad. We have a shared association management company that provides all the web, marketing and administrative support to our Chapters.

How to Get Involved

We offer opportunities for membership, sponsorship and volunteer roles that will bring you into closer contact with members of our ecosystem. For further information, please:

Visit our website at www.exitplanningexchange.com
or contact Rana Gorzeck, RGorzeck@wsh-law.com, 561-835-2111
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