



## Exit Planning Exchange Overview

The Exit Planning Exchange is an association of diverse advisors sharing expertise and knowledge to help their private company clients build business value, transfer ownership and create a legacy of success in their lives and their communities.

### The Basics

Our 1000+ 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

We have XPX Chapters in 20 cities: Atlanta, Austin, Charlotte, Chicago, Dallas, DC Metro, Hartford, Fairfield County, Greater Boston, Houston, Long Island, Maryland, Nashville, New York, New Jersey, Philadelphia, San Antonio, South Florida and Triangle with more in development in the U.S. and abroad.

Each XPX Chapter is a locally-controlled non-profit that is supported by XPX Global LLC. We have a shared association management company that provides all the web, marketing and administrative support to our Chapters. Startup Chapters benefit from direct coaching by Global as well as a detailed Startup Kit, Chapter Manual and on-line Leadership Collaborative with resources for all the key Chapter functions.

### Startup Requirements

1. Agree to monthly coaching/checkins
2. Gather 15 people
3. Raise \$15,000 in startup capital

### Launch Team

- 1 – Catalyst(s)
- 5 – Founders
- 15 – Launch Committee/Sponsors
- 50 – First Members

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