

Nomination: 5470

Exit Planning Institute's newest Educational Platform

Page: General Information

Provide information about the company to be considered for the award. If you will be nominating an individual, specify the nominee's employer.

Name of Organization/Company

Exit Planning Institute

Additional Contacts

I do not wish to list additional contacts

Page: Entry Information

Entry Title

Exit Planning Institute's newest Educational Platform

Category

F01 - F70 Solutions, Implementations, and Training Programs or Media > F01 - F48 Solutions & Implementations > F30 - Learning Management Solution - Implementation

Solutions & Implementations Submission Format

Written Answers

a. If you are nominating a brand-new product, state the date on which it was released. If you are nominating a new version of an existing product, state the date on which the update was released. If you are nominating an implementation, state the date on which the implementation was completed. Required

EPI Academy was launched on July 26, 2021, by Exit Planning Institute. We saw the need in the exit planning industry for easily accessible continuing education that could be completed online. While we have offered online education for over a year, we understood the impact a dedicated online learning platform would have on our advisor community. As a result, we created a top-of-the-line online education platform for professional business advisors to learn more about exit planning and associated topics.

b. Describe the features, functions, and benefits of the nominated product, service, or implementation (up to 350 words). Required

EPI Academy is Exit Planning Institute's new interactive online learning platform. The platform was designed to allow advisors to easily find the content and education they are looking for to enhance their practice and get the most return on their professional education. EPI Academy creates an immersive experience for attendees that allow them to get the interactive education they would receive in a classroom but now online. We currently have four active courses on the platform with five additional courses releasing this year.

These courses provide business advisors with recommended learning and professional development plans. Courses include Marketing for the Professional Advisor Masterclass, Practice Launch Lite, Implementing the CEPA Playbook, and CEPA Program Exam Prep. These courses provide advisors with expert faculty lead instruction, critical thinking questions, and continuing education credits (CE) towards their credential with our organization.

Our Certified Exit Planning Advisors (CEPA) need 40 hours of continuing education to retain their credential with EPI. Our advisor community has stressed the importance of earning this CE through EPI as we are the leaders in exit planning education. As such, we have incorporated expanded exit planning education in EPI Academy to meet this need.

To meet the growing demand from the worldwide advisor community while staying true to our best-in-class commitment to high-quality educational experiences, EPI Academy is redefining what online learning means, breaking away from "webinar mode," and bringing something new to the market that hits on the most critical factors for exit planning education.

c. For the nomination of a product or service, outline the market performance, critical reception, and customer satisfaction with the product or service to date. State monetary or unit sales figures to date, if possible, and how they compare to expectations or past performance. Provide links to laudatory product or service reviews. Include some customer testimonials, if applicable. For the nomination of an implementation, outline the need or problem that was identified, why the solution was chosen, how the solution was implemented, and the results of your implementation to date (up to 350 words). Required

Exit Planning Institute (EPI) saw a need for expanded educational offerings in the exit planning space. As a result, we created the platform, EPI Academy, to meet and far exceed the needs of exit planning advisors. The courses available to these advisors not only enhance their existing exit planning knowledge but expand upon it in new ways. Currently, we offer four courses through this platform. The courses range from preparing advisors to pass their certification exam to marketing themselves as a trusted advisor and launching their own successful exit planning practice.

EPI Academy is an entirely online education platform that allows advisors to complete their courses on their own time. This was a necessity for our target demographic of financial advisors, CPAs, and wealth managers.

Since its launch in July of 2021, EPI Academy has grown [REDACTED FOR PUBLICATION]. EPI offers a state-of-the-art credentialing program for exit planning advisors called the Certified Exit Planning Advisor (CEPA) program. The CEPA program typically accounts for the majority of the products sold by EPI, however, EPI Academy has surpassed the number of CEPA programs sold [REDACTED FOR PUBLICATION].

We have utilized advisor feedback regarding the multiple [REDACTED FOR PUBLICATION] needed to access our extensive member center and the new EPI Academy. As a result, we are in the process of revamping our website to create an immersive digital ecosystem that will encompass all of our online education and content. This will streamline our customer journey and provide our advisors with a better user experience.

d. Reference any attachments of supporting materials throughout this nomination and how they provide evidence of the claims you have made in this nomination (up to 250 words). Optional

We have included articles providing background information about a few of the EPI Academy courses, testimonials from advisors who have completed an EPI Academy course, as well as informational one-pagers that are provided to advisors in our exit planning community.

Webpage Link

<https://exit-planning-institute.org/epi-academy-courses/> (<https://exit-planning-institute.org/epi-academy-courses/>)

Would you like to add an additional webpage link?

Yes

Webpage Link 2

<https://exit-planning-institute.org/blog/marketing-for-the-professional-advisor-masterclass/> (<https://exit-planning-institute.org/blog/marketing-for-the-professional-advisor-masterclass/>)

Would you like to add an additional webpage link?

Yes

Webpage Link 3

<https://exit-planning-institute.org/blog/enhance-your-exit-planning-expertise-with-epi-academy/> (<https://exit-planning-institute.org/blog/enhance-your-exit-planning-expertise-with-epi-academy/>)

Would you like to add an additional webpage link?

No

Supporting Document

Download File (<https://stevies-sage.secure-platform.com/file/13702/eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJtZWRpYUlkIjoxMzcwMiwiaWxsb3dOb3RTaWduZWVcmwiOiJGYWxzZSIsImInbm9y9dOiki9nUHwQkHgL3bvXpLqng?Nicholas%20Goode%20-%20Marketing%20for%20the%20Professional%20Advisor%20Masterclass%20Testimonial.png>)

Would you like to add an additional supporting document?

Yes

Supporting Document 2

Download File (<https://stevies-sage.secure-platform.com/file/13703/eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJtZWRpYUlkIjoxMzcwMywiWxsb3dOb3RTaWduZWVcmwiOiJGYWxzZSIsImInbm9vLcjobB7q-5wsbHDIcssH43Te9wIe4?Portia%20Haggerty%20-%20EPI%20Academy%20Testimonial.png>)

Would you like to add an additional supporting document?

Yes

Supporting Document 3

Download File (<https://stevies-sage.secure-platform.com/file/13704/eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJtZWRpYUlkIjoxMzcwNCwiWxsb3dOb3RTaWduZWVcmwiOiJGYWxzZSIsImInbm9yGNaoqJYU?Zach%20Ripka%20-%20EPI%20Academy%20Testimonial.png>)

Would you like to add an additional supporting document?

Yes

Supporting Document 4

Download File (https://stevies-sage.secure-platform.com/file/13705/eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJtZWRpYUlkIjoxMzcwNSwiWxsb3dOb3RTaWduZWVcmwiOiJGYWxzZSIsImInbm9ScRSyc?MARKETINGMASTERCLASS_FA-4.mp4)

Would you like to add an additional supporting document?

Yes

Supporting Document 5

Download File (https://stevies-sage.secure-platform.com/file/13706/eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJtZWRpYUlkIjoxMzcwNiwiWxsb3dOb3RTaWduZWVcmwiOiJGYWxzZSIsImInbm9y07Hv_N0jwGWeUM45WYZzh7y_IIEs?EPI-MMC_Checklists_V3.pdf)

Would you like to add an additional supporting document?

Yes

Supporting Document 6

Download File (<https://stevies-sage.secure-platform.com/file/13709/eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJtZWVpYUlkIjoxMzcwOSwiYWxs3dOb3RTaWduZWRVcmwiOiJGYWxzZSI6Imlnbm9EPI%20Academy%20One%20Pager.pdf>)

Would you like to add an additional supporting document?

No

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