Institute of Advisors
Est. 2009

THE SIMPLEST & EASIEST WAY TO OFFER EXIT & SUCCESSION PLANNING SERVICES

EXIT & SUCCESSION PLANNING CERTIFICATE COURSE

Helps you to **leverage, scale and grow your advisory practice.**

www.instituteadvisors.com

LEARN THE SKILLS OF HOW TO BECOME A SUCCESSFUL EXIT & SUCCESSION PLANNING BUSINESS ADVISOR

Learn from expert advisors from around the world. The Institute of Advisors was founded by experienced Business Advisors who wanted to create a practical curriculum to increase the standards of Business Advisory around the world. The academic panel includes recognised thought leaders from around the world.

The Institute of Advisors is a Australian government registered training organization (RTO 91675). The Institute delivers nationally recognised qualifications, that are flexible, self paced to fit to your busy schedule.

The Institute has chapters in **10 countries** around the world. Head Office is in **Sydney Australia**

NATIONALLY RECOGNISED

The Institute of Advisors is a government registered training organisation

INSTITUTE OF ADVISORS

A "**certificate course in exit & succession planning**" that will transform your advisory practice

The Exit & Succession Planning certificate course provides you with a step-by-step pathway to implementing an exit & succession plan.

Nationally Recognised Training

The NAT 1889006 course is offered as a government accredited course. The Institute of Advisors is a government accredited training organisation RTO 91675

THE PEREFCT SOLUTION FOR…

ACCOUNTANCY FIRMS

Learn how to add Business Advisory and Exit & Succession planning as one of your fastest growing revenue sources. Learn how other accountancy practices around the world have successfully added advisory to their practice.

EX BUSINESS OWNERS & MANAGERS

Use the great skills you have learnt from practical management of companies and start mentoring business owners. Learn how to help a business owner build the value of their business and successfully exit.

NEW START ADVISORS

Our course will provide you with the confidence, the processes and the “Step by Step” guides to getting you on your way in building a successful practice.

CONSULTANTS & BUSINESS COACHES

Provides you with the processes and methodology to accelerate your practice. Helps you to stand out from the crowd and be part of an international network.

M&A FIRMS & BUSINESS BROKERS

The course shows M&A firms and Business Brokers how they can use Exit & Succession planning as a funnel for new leads and a process to build a better business to sell.

WEALTH PLANNERS

Many advisors are using Exit & Succession planning as a starting conversation with business owners. This leads to wealth and tax planning and funds under management at the eventual liquidity event.

“OFFERING EXIT & SUCCESSION PLANS IS EASY NOW I HAVE COMPLETED THE INSTITUTE COURSE”

EXIT & SUCCESSION PLANNING CERTIFICATE COURSE

WHAT DOES IT DO

Structure and automate exit & succession planning with your clients. Step-by-step process allowing you to develop a one-page plan, gap analysis and action plan of the value drivers for the business as well as personal diagnostics to ensure your client is ready for the next step.

WHY DO I NEED IT

Tap into the fastest growing advisory segment. This will help you to engage and offer new services to build your practice revenue

FEATURES OF THE COURSE

Self paced
Interviews with successful advisors around the world
165 page client workbook – The One Page Exit Plan
Forms, tools and assessments that you can use

WHAT TOOLS WILL I WALK AWAY WITH

- Client Discovery templates
- Business Owner Assessments including
  - Business Attractiveness
  - Exit Readiness
  - Personal Wealth Risk and Tax
  - Personal Wellness and life after exit
- One Page Planning Goals Sheet
- Value Enhancement Client Worksheet
- Step by Step practice Process template
- Sample Exit Plan

KEY MODULE LEARNING OBJECTIVES

MODULES	COURSE TOPICS	LEARNING OBJECTIVES
WELCOME TO THE COURSE. ABOUT THE INSTITUTE AND YOUR INSTRUCTOR	Welcome to the course How to use this course Course Overview Handbook Goals of course Workbook & Course Guide All businesses need an exit plan Keys to the course The Institute of Advisors Community A message from the instructor Methodology Evolution	**By the end of this module, students will have an understanding of: -** The goals of the course, The deliverables that each student will walk away with, How to use the learning platform course and workbook guide. The institute of advisors, The background of the course instructor and the evolution of the exit & succession planning methodology.
INTRODUCTIONTOEXIT PLANNING	The Need for Exit Planning Exit Planning Client Discovery What is an Exit Plan! What are the three primary areas that an exit and succession plan cover. 6 Exit Planning Questions 6 Questions lead to advisory work Get everyone on the one page Empathy and listening	**By the end of this module, students will have an understanding of: -** What an exit and succession plan covers. Why it is important that business owners prepare an exit and succession plan. What are the primary areas and questions that should be covered in an exit plan.
EXIT PLANNING FOUNDATION	Create a One Page Exit Plan Exit Planning Examples Value Max Grid One Page Exit Goals Course Summary	**By the end of this module, students will have an understanding of:** How to develop an exit plan and how to summarise the exit planning goals into one page. How to may the process onto a 4 dimensional grid. The entire course curriculum summarised into a 10 minute lesson.
VALUE ENHANCEMENT	Business Value Basics Value Enhancement Basics Value Enhancement with a client Example	**By the end of this module, students will have an understanding of** The value enhancement process and how to talk to clients. How to create a step by step workshop with the client.

KEY MODULE LEARNING OBJECTIVES

MODULES | **COURSE TOPICS** | **LEARNING OBJECTIVES**

PERSONAL VISION & DISCOVERY

Course topics

- Personal Vision Workbook Pages
- Exit Planning Discovery
- Personal Vision Statement
- What Factors affect timing
- Business owner handcuffs and earnouts
- Business Owner alignment
- Valuation Expectations
- Exit Options

By the end of this module, students will have an understanding of:

- The Exit planning, discovery process.
- How to develop a personal vision statement for a client.
- How to work with the client to clarify key issues in developing the statement including the estimated value now and at exit.

BUSINESS VALUE GOALS

Course topics

- Business Value Workbook
- Business Value Goals
- Revenue & Profit Forecasts
- Definition of profit & owner addbacks
- Understanding Client timeframes

By the end of this module, students will have an understanding of

- How to help a client establish Valuation goals.
- What the drivers of business value are.
- And what factors affect client time-frames.

BUSINESS OWNER READINESS

Course topics

- Owner Readiness Workbook
- Introduction
- Owner Readiness Issues
- Case study start
- **Personal Wealth Risk & Tax Readiness**
  Net proceeds
  Personal net assets
  Desired future income
  Collaborating with professionals
- **Personal wellness**
  Understanding business owners life after exit
  Legcy issues
  Other personal issues

By the end of this module, students will have an understanding of:-

- How to a business owner ready for the exit planning process.
- What are the prime goals of a business owner. The difference between personal wealth, risk tax and life after exit and wellness goals.

WORKING WITH CLIENTS

Course topics

- Educating your Client.
- What to do when you first engage a client
- How to structure your practice
- How to setup ongoing revenue
- How to setup an advisory board
- Difference plans for different advisors

By the end of this module, students will have an understanding of

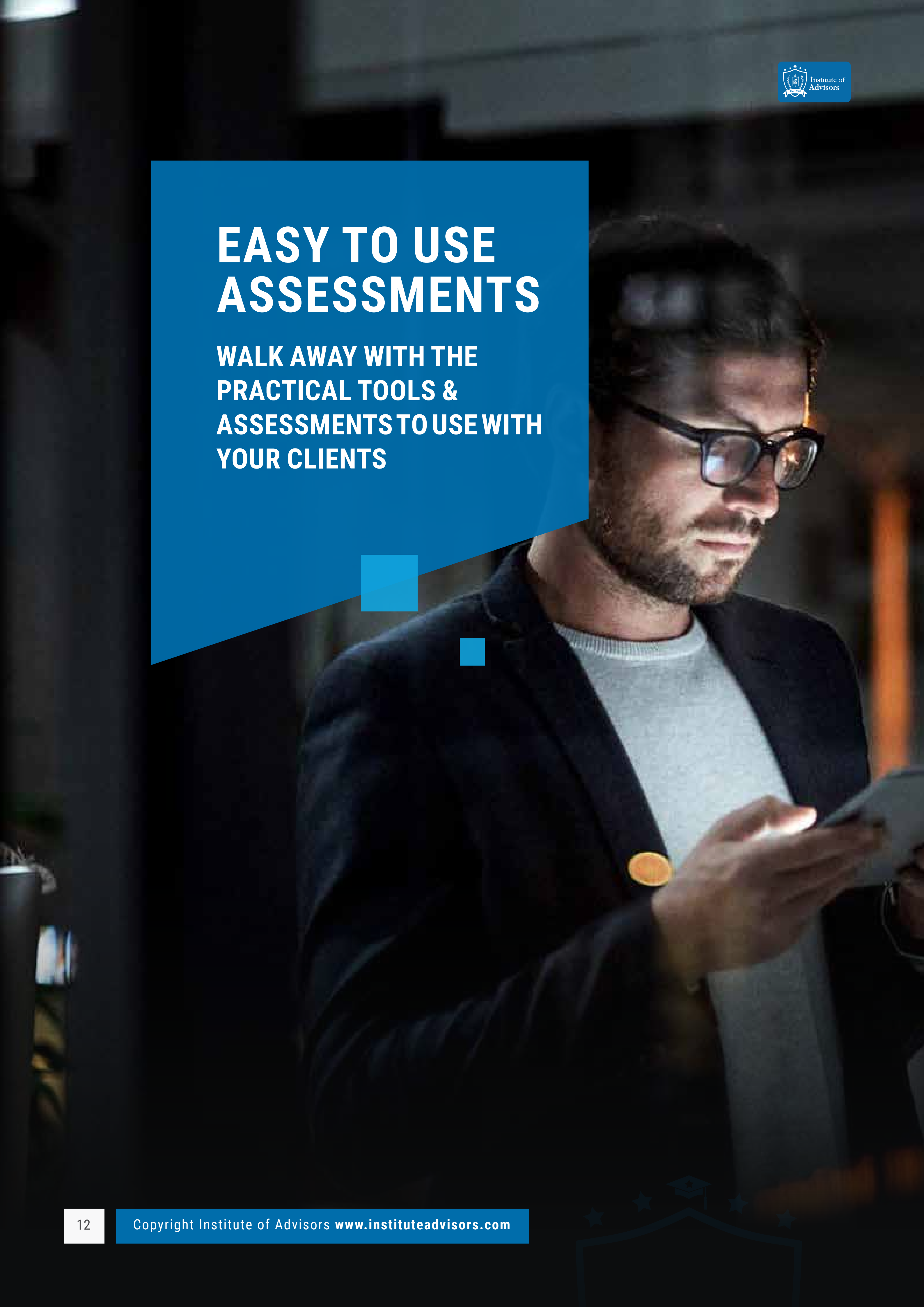
- How to educate clients on the exit planning process
- what points should an adviser focus on? How to collaborate with other business advisors and professionals and how to set up a monthly ongoing recurring revenue process.

PRACTICAL TEMPLATES INCLUDED IN THE COURSE

- Sample Exit & Succession Plan
- One Page Exit Plan Workbook
- Exit Planning Course Guide
- One Page Blank Goals Template
- One Page Goals Template mid-size businesses
- One Page Goals Template small-size businesses
- Attractiveness & readiness assessments
- Personal wealth risk & tax assessment
- Personal wellness and life after exit assessments
- Value Enhancement Worksheet

THE COURSE HELPS ME TO **ENGAGE MY CLIENTS** AND **OFFER** NEW SERVICES.

EXIT & SUCCESSION PLANNING
WILL CHANGE A BUSINESS OWNER'S LIFE FOREVER!



EASY TO USE ASSESSMENTS

WALK AWAY WITH THE PRACTICAL TOOLS & ASSESSMENTS TO USE WITH YOUR CLIENTS

BUSINESS ATTRACTIVENESS

30 simple questions over 4 categories to determine how attractive the business is to potential investors.

PERSONAL WEALTH RISK & TAX

Ensure the owner is financial prepared to maximise net proceeds and lead a comfortable lifestyle post exit.

EXIT PLANNING READINESS

121 deep dive value driver questions across 22 categories used to identify and risk factors that could potential devalue a business at the time of due diligence.

PERSONAL WELLNESS

Determine how prepared an owner is from a welfare and wellbeing perspective for life after exit.

INSTITUTEOFADVISORS

The Institute of Advisors was founded to provide a set of professional benchmarks and standards that covers a multi faceted industry. The Institute in conjunction with leading industry partners has developed a set of methodologies and processes that every advisor should follow. Its objective is to raise the professional benchmark and develop a set of industry standards.

ABOUT THE EXIT & SUCCESSIONPLANNING COURSE

The Exit Planning Certificate course was developed by the Institute of Advisors. It has been designed to educate all business advisors in the area of Exit & Succession Planning. Exit Planning is the fastest growing profitable niche for advisors, accountants, wealth planners and business coaches.

The course will focus on how to maximize the value of a business and prepare for a successful ownership transition. The course is perfect for consultants, advisors, accountants, business brokers, lawyers, financial planners and new start advisors looking to improve knowledge, skills and professionalism in the expanding their advisory capabilities.

The course will provide the methodology and practical framework that will allow all advisors to easily integrate Exit Planning into their practices.

GOVERNMENT ACCREDITED

The Institute of Advisors is a registered training organisation RTO 91676. This course can either be taken as a nationally registered and assessed course or as a non assessed course by our international students.

As a VET course the course is registered under

NAT10889006 Facilitate Business Owner Exit & Succession Planning

Nationally Recognised Training

COURSES RUN BY THE INSTITUTE

Certified Business Advisor Course (CPBA):- Become a certified Business Advisor. This is an internationally recognised credential. (VET or Non VET) VET = Vocational Education & Training and is government accredited modules.

Exit & Succession Planning Certificate Course: Non-VET Compliance Assessed Exit & Succession Planning course (VET or Non VET) If the vet course option the code is **NAT11408006** Facilitate Business Owner Exit & Succession Planning (Australian Government recognised credential)

NAT 11408 Diploma of Business Advisory. (Australian Government recognised credential.)

A statement of attainment is issued by a Registered Training Organisation when an individual has completed one or more accredited units

Those that receive Nationally Recognised Training can be confident that their qualifications are of the highest quality and will be recognised by industry and other registered training organisations in every state of Australia.

Benefits of Nationally Recognised Training for Business

The benefits of utilising Nationally Recognised Training for business include:

- Providing a structured, formalised approach to training recognised by the industry
- Creating industry-endorsed competency standards
- On-the-job training integration
- Providing a competitive edge
- Up-skilling existing employees to keep up with new trends and technologies

Nationally Recognised Training

WHAT MAKES A GOOD ADVISOR

- Good advisors are able to build great relationships with clients.
- Good advisors care about their clients and help them not to feel alone and helpless
- They think strategically and look at the big picture and are great problem solvers.
- They look holistically at the personal as well as the business perspective.
- They help improve longer term efficiency and processes.
- They help the business to stop firefighting and re-inventing the wheel.

WHAT STUDENTS SAY ABOUT OUR COURSES

THE INSTITUTE RECEIVES POSITIVE REVIEWS ON ALL OUR COURSES. BELOW ARE SOME REVIEWS ON OUR PREVIOUSLY RELEASED COURSES

PETER CHRISTMAN
The Christman Group

"Real world, practical insights and techniques, allows consultants to be productive almost immediately. A must for anyone entering the advisory profession or those in it that are not achieving their goals and objectives

DARIO ZANICHELLI
Chicagoland CPAs

"I highly recommend this course for beginners in consulting for small to medium sized businesses"

DAVID KEIR
Great Course

The content of the course is very good, but I took most value from the excellent video's of successful business advisors sharing their knowledge, led by Peter himself.

LINDA HAMILTON
Accredited Business Advisor & Consultant Course

Great course. The content and tools provide a system for business advisors to be more effective and to have a greater impact on the success of their clients.

PETER KINNAIRD
CPBA Turns Experience into Professional Recognition

This course & the Institute itself ads Professional recognition to people who have a wealth of business experience . It sets the standards that should be there for any profession especially one that is as influential as being a Business Advisor. I totally recommend this course and the Institute to any person who wants to be in this profession.

LORI PARKINS
Parkins Financial

"What I most liked about the course was that it pointed me in the direction that I really needed to focus on. Immediately after the course I had an opportunity with a client to build a 90 day plan on how to change her approach to marketing for new clients and other customers"

WHY BECOME CERTIFIED WITH THE INSTITUTE OF ADVISORS?

- Develop a stronger more successful advisory practice with a respected international credential.
- Stand out from other advisors and display a brand of trust and quality.
- Implement a process in your practice that has been developed over 30 years in conjunction with leading advisors from around the world.
- Ensure your advisory services are professionally driven and lead to positive client outcomes.
- Become a part of both a global and hyperlocal network of leading advisors

WHO IS THIS COURSE FOR?

Anyone wishing to build a consultancy or advisory practice targeting small to medium sized businesses

- Accountants / Bookkeepers
- Financial & Wealth Planners
- Business Advisors
- Consultants and Business Coaches
- Ex Business Managers
- Ex Business Owners
- Professional Advisors – such as M&A, Business Brokers and Lawyers

HOW DOES THE COURSE BENEFIT NEW START BUSINESS ADVISORS?

"I knew I wanted to start an advisory practice but didn't know where to start and thought I lacked the credibility.The Certified logo gives me credibility & joining the local chapters makes me feel like I am not alone anymore."

Credibility & Marketing - Independents such as ex business managers and owners make great business advisors. However, independents often feel alone when stepping away from a field they have been in for an extensive amount of time and starting a new career. They don't feel confident and lack credibility that then impacts on their marketing. Our Advisory Certification program was designed from the ground up by successful advisors from across the globe. The accreditation will give anyone that is starting a new practice instant credibility and a step by step process to market your practice.

Community & Partnerships - Stepping into the world of advisory can be lonely. Our community of advisors allow you to mix with other advisors, network with them, receive and give referral work and continuously self develop. The Institute of Advisors has certified advisors across the globe with online and face-to-face events running frequently to further exp[and your knowledge and network.

Don't Want to Reinvent the Wheel - Independents often lack a detailed plan when they step into the advisory space, they want to implement a system but don't want to re-invent the wheel.Our Advisory certification program gives you a step-by-step guide to establishing and implementing your advisory services and developing a business model that you can scale, leverage and grow.

WHY CHOOSE THE INSTITUTE OF ADVISORS

The Institute of Advisors was established in 2009 and is the **leading global** body representing **business advisors and consultants** around the world. We run certification courses in over 10 countries around the world and are leading the way in setting a worldwide set of standards.

Institute of Advisors
Est. 2009

ENROL TODAY!

Commence your Business Advisory career with the Institute of Advisors today to take the next step forward in your career.

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PRACTICAL

- Courses developed with insights from successful advisors around the world
- Learn from professionals using real world case studies

RESOURCES

- Receive access to tools and templates to help you start your practice.

FLEXIBLE

- Course can be done whilst working full time
- Fit study around work, family, life.

SUPPORT

- Dedicated team of trainers and support staff on hand to guide you
- Up to date, easy to understand course materials