



Continuing Education (1Hr) Webinar for NAIFA-Arizona Members: "Exit Planning for Advisors"



March 21, 2024
9:00 a.m.-10:00 a.m.

This course discusses the BEI Seven Step Exit Planning Process, which is a comprehensive approach to business succession planning. Within the context of Exit Planning, the course discusses business continuity planning, estate planning and retirement.

Presenter: **Vincent M. D'Addona, MSFS, CLU, ChFC, CExP, RICP, CEPA, AEP (Distinguished)**

Founder: Valent Wealth, LLC

Vincent is an advisor at Valent Wealth, LLC. He has 44 years of experience providing services in four core areas: Estate Planning, Exit Planning for the owners of closely held businesses, Distribution Planning for those at or near retirement, and investment Coaching. He was inducted into the NAEPC Estate Planning Hall of Fame in 2017. Often known as the experts' expert, he has helped hundreds of individuals move closer to their full financial potential.



No Registration Fee - But Must Register. Please click following link to register. Reply/Confirmation will come directly from presenter. Thank you.
Register in advance for this webinar:

https://us06web.zoom.us/webinar/register/WN_1aHmRJ2oR3qupuyABKqdGg

After registering, you will receive a confirmation email containing information about joining the webinar.

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