

## 1 - Exit Planning Exchange Overview

XPX is a highly focused learning community of professional advisors who bring professionalism, collaboration and education to business owners in the heart of the middle market. Our members work in all three phases of the private company life cycle to help their clients: 1-build valuable businesses, 2-execute a successful transition and 3-achieve the life and legacy they seek.

### The Basics

Founded in Boston in 2007. Our 600+ members are experienced advisors who:

- Work directly with owners/senior managers of premier private companies (\$5 to \$100 million in revenues with potential for sustainable, transferrable value)
- 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 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

Our shared values include:

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

### Chapters

Boston, Hartford, Fairfield, New York, New Jersey, Philadelphia, Maryland, DC Metro, Chicago, San Antonio and Atlanta 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. 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 Steps

1. Recruit Launch Sponsors
2. Recruit Free Members
3. Launch First Event

### Launch Team

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

Learn more at: [www.exitplanningexchange.com/start-a-chapter](http://www.exitplanningexchange.com/start-a-chapter)