

XPX Tri-State Sponsorship Opportunities



XPX is a multi-disciplinary community of professional advisors who work collaboratively to help owners build valuable businesses and assist them in preparing and executing a successful transition. Private company transitions require a broad view of the entire life cycle of a private company including:

Business value growth | Business value transfer | Owner life and legacy

Our community includes advisors and owners in all stages of this process. Our members have specific areas of expertise as well as a holistic understanding of the breadth of challenges an owner faces throughout the stages of the private company life cycle. This helps XPX members to work collaboratively in the best interest of their clients.

About Us

The Exit Planning Exchange is a unique professional organization that provides networking, collaboration and educational opportunities for advisors, consultants, educators and researchers focused on preparing business owners for the successful transition of their businesses. Our goal is to build a strong, active consortium of experienced practitioners and specialists working both independently and collectively to help business owners build and successfully exit their businesses.

We are unique in that we are the only open advisor network in the private company/business value transfer market. This means that we do not advocate a single approach or vendor. Instead, we endeavor to be a place where all advisors, owners and vendors can interact and collaborate.

Our Members

Our members include Professionals from a range of business advisory disciplines including lawyers, accounting and valuation professionals, investment bankers, commercial bankers, executive coaches, private wealth managers, insurance advisors, marketing and management consultants, as well as former business owners who now advise fellow business owners on exit planning.

Interested? Questions?

Contact us at: admin@exitplanningexchange.com

Tri-State Sponsorship

COST PER LEVEL

Platinum	Gold	Silver	Bronze
\$15,000	\$10,000	\$6,000	\$3,000

EXCLUSIVITY AT TRI-STATE LEVEL

Absolute Exclusivity	1 per category	2 per category	3 per category
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Tri-State Level Benefits

MEMBERSHIPS INCLUDED

5 3 2 1

ATTENDANCE AT JOINT TRI-STATE MEETINGS

Included Included Included Included

ATTENDANCE AT REGIONAL CHAPTER MEETINGS

Included Included Included Included

ATTENDANCE AT LOCAL CHAPTER MEETINGS

Included Included Included Included

MEMBERSHIP COST

\$550 \$550 \$550 \$550

Implied Benefit

\$2,700 \$1,650 \$1,100 \$550

MARKETING PRESENCE

Logo Placement with Email Links

Website: Tri-State Website, Local Chapter Website

Highlighted Prominent Included Included

Event Promotion: Tri-State Events, Local Chapter Events

Highlighted Prominent Included Included

At Event Presence: Tri-State Events, Local Chapter Events

Highlighted Prominent Included Included

Opportunity to Introduce Speaker: Tri-State Events

Yes When Available – –

Guest Passes per event: Tri-State / Local Chapter

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Ability to publish approved content:

Tri-State Website, Tri-State LinkedIn Group

5/yr 3/yr 1/yr –

Tri-State Email List

2/yr 1/yr – –

Local Chapter Sponsorship

COST PER LEVEL

Platinum	Gold	Silver	Bronze
\$7,500	\$5,000	\$3,000	\$1,500

EXCLUSIVITY AT CHAPTER LEVEL

Absolute Exclusivity	1 per category	2 per category	3 per category
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Local Level Benefits

5 3 2 1

Discounted Discounted Discounted Discounted

Discounted Discounted Discounted Discounted

Included Included Included Included

\$350 \$350 \$350 \$350

\$1,750 \$1,050 \$700 \$350

Logo Placement with Email Links

Website: Local Chapter Website

Highlighted Prominent Included Included

Event Promotion: Local Chapter Events

Highlighted Prominent Included Included

At Event Presence: Local Chapter Events

Highlighted Prominent Included Included

Opportunity to Introduce Speaker: Local Chapter Events

Yes When Available – –

Guest Passes per event: Local Chapter

4 2 1 –

Ability to publish approved content:

Chapter Website, Chapter LinkedIn Group

5/yr 3/yr 1/yr –

Chapter Email List

2/yr 1/yr – –