

Exit Planning Exchange Atlanta Overview

Welcome to XPX Atlanta! At the hub of the Southeastern United States business community, XPX Atlanta is ideally positioned to serve an extremely high concentration of family and privately-held businesses. Our board, membership, and sponsors are comprised of a high-quality network of advisors and service providers focused upon collaboration and placing the clients' interest at the center of all that we do.

[Join Now!](#)

XPX is all about collaboration, learning and building relationships to serve our clients. XPX members are professional service providers who assist with business value growth, exit and succession planning, business value transfer, and business owner life and legacy. Assisting business owners through all stages of the company life cycle, XPX members put their clients first by collaborating as a team in order to provide clear, coordinated advice.

MISSION
XPX Atlanta delivers a collaborative-based networking exchange, broad representation of exit planning competencies, and a bridge spanning value-building, value transfer, and life-legacy for business owners.

VISION
XPX Atlanta is fundamentally changing the trajectory of exit planning services in the Southeast United States.

VALUES
Work Collaboratively Put the Client First Think Long Term Always be Learning Consider the Human Angle

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

How to Get Involved

Membership – Become a member to participate in all the activities. Be recognized on the XPX Atlanta site. Share your expertise in our on-line Owners' Academy.

Sponsorship – Move to the next level by adding your brand to our events, emails and website through a local sponsorship.

Leadership – Get maximum visibility and respect by contributing to the growth and success of XPX Atlanta through participation in our committees and/or board of directors.

For further information, please visit our website at www.exitplanningexchange.com/Atlanta

Advisor Principles

XPX Atlanta shared values are based on five core principles:

1. Work collaboratively

No advisor works in isolation. Every private company and its owners rely on a number of external advisors. It is in the client's interest that these advisors work well together. Advisors can help their clients by having a deep network of other advisors they know and trust, and by understanding how to work as a team in the best interest of the client.

2. Put the client first

Many advisors are subject to extensive codes of conduct of their own professions designed to put the client first. Collaborative advisors can help their clients by communicating and working with both their clients and the clients' other advisors to ensure that there are no conflicts of interest and that the team meets the highest standards of confidentiality and transparency.

3. Think long term

Most privately-held businesses create jobs for the owners and employees but close down after the owners retire. A smaller number of companies defy this pattern. They not only generate a living for themselves and their employees, they also create transferrable, realizable exit value. The Exit Planning Exchange was founded in the belief that more companies could become long-lived assets with the right help to create lasting value for the owners, employees and stakeholders in their communities. Advisors can help their clients understand and navigate the road to long-term value.

4. Consider the human angle

Private companies are different from public companies in that their ownership tends to be concentrated in a single person or small group of people. This generally means that the owners and the business are closely tied together. These ties can be financial, ownership, taxation, family and emotional. Advisors can help their clients by being aware of the complex relationship between the company and its owners, and by considering both the human and the business dimensions of a company.

5. Always be learning

The business environment changes constantly. Private companies and their advisors must adapt to keep up. Advisors can help their clients by seeking to learn latest trends and best practices, not only in their own field but also in other fields that affect their clients' success.

The bottom line of these Principles is that the big picture matters. The work of an advisor to a privately held business or its owner requires more than just expertise. It also requires systems thinking and a desire to do what is right for the owners, the company and its stakeholders over both the short- and long-term.

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What to expect at XPX Atlanta

We're about long-term thinking:

For business owners – Private businesses are often successful in the short term but fail to create a repeatable, sustainable business with transferable value and lasting legacy. We provide learning and networks to help our members' clients build more valuable, successful businesses.

For advisors – No one advisor has all the skills needed to shepherd their private company clients through their entire life cycle from growth and transfer of value to owner legacy. We convene a diverse community of advisors who learn from each other, ensure their clients get the right advisors and build their own practices along the way.

What to expect from your involvement:

Resources – You'll learn from great content and programming. "What I know, What I don't know, What I don't know that I don't know. XPX helps me get this right."

Relationships – You'll expand your network with people who are genuine, inviting and welcome collaboration. "We're givers, not takers (and givers get more in the long run)"

Visibility – You'll raise your profile by sharing your knowledge in meetings, networking and contributing to our on-line Owners' Academy knowledge base. "I know the guy/gal!"

Principles – You'll find a group of like-minded advisors who share our values of collaboration, client first, long-term thinking, focus on the human factor and continuous learning. "It's about the quality of the people in the room."

Leadership –Get maximum visibility and respect by contributing to the growth and success of the local board.

If you a long-term thinker with a successful business that supports the growth, transition and legacy of privately-held businesses, then XPX Atlanta is a great place for you.

XPX Global Member Demographics

XPX Advisors

- Work directly with owners/senior managers of lower middle market companies (\$5 to \$100 million in revenues)
- Have expertise in one of our 12 professions (see lists below)
- Demonstrate the XPX Core Principles in their work

Distribution

Please note that many members have more than one professional role. This is the distribution of all the titles:

Consultant	25.0%
Wealth Planner	15.0%
M&A Intermediary	10.0%
Accountant	10.0%
Attorney	10.0%
Banker	7.0%
Insurance	7.0%
Valuation	5.0%
Coach	5.0%
Investor	5.0%
Non-profit	0.5%
Virtual Manager	0.5%

Specialties

Our member directories feature 75 areas of expertise. Below are the top seven for each profession:

Accountant

- Tax
- Family business
- Business management
- Finance
- Audit
- Business growth
- Financial Modelling

Attorney

- Mergers
- Buy side/Acquisitions
- Family business
- Estate planning
- Sell side/Divestiture
- Equity
- Due diligence

Banker

- Finance
- Lending
- Business development
- Debt
- Family business
- Investments
- Cash management

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Specialties (cont.)

Coach

- Business growth
- Business management
- Management succession
- Strategic planning
- Leadership Development
- Change Management
- Entrepreneurship

Investor

- Equity
- Finance
- Investments
- Family business
- Financial Modelling
- Private equity
- Business development

Valuation

- Transaction advisory
- Sell side/Divestiture
- Buy side/Acquisitions
- Financial Modelling
- Family business
- Mergers
- Business growth

Consultant

- Business growth
- Business management
- Strategic planning
- Family business
- Entrepreneurship
- Business development
- Management succession

M&A Intermediary

- Sell side/Divestiture
- Buy side/Acquisitions
- Transaction intermediary
- Mergers
- Transaction advisory
- Finance
- Equity

Virtual Manager

- Business growth
- Strategic planning
- Business management
- Business development
- Change Management
- Leadership Development
- Cash flow enhancements

Insurance

- Estate planning
- Employee benefits
- Investments
- Risk management
- Retirement
- Family business
- Strategic planning

Non-pro

- Strategic planning
- Board of Directors (not for profit)
- Business growth
- Business management
- Financial Modelling
- Operations
- Cash flow enhancements

Wealth Planner

- Investments
- Estate planning
- Retirement
- Family business
- Trusts
- Fiduciary
- Charitable giving

The diversity of the XPX Atlanta membership is its greatest strength. It gives you a big pool of professionals and specialties to attract to your community. And it ensures that every gathering of XPX members has a rich mix of skills and experience to support business owners in all stages of their business life cycle from growth to transfer and legacy.

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