

CISION

Marilyn Suey, CFP®, Earns the Highly Coveted Certified Exit Planning Advisor (CEPA) Credential to Help Women Sell Their Businesses at Maximum Value

PR Newswire

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SAN RAMON, Calif., Nov. 20, 2024 /PRNewswire/ -- Marilyn Suey, CFP, CEO of [The Diamond Group Wealth Advisors](#), announced today that she has received the Certified Exit Planning Advisor (CEPA) Credential from the Exit Planning Institute.

"The training I received will enable me to help women business owners get the highest value when they sell their businesses so they can have a more fulfilling life now," said Ms. Suey, CERTIFIED FINANCIAL PLANNER®, Certified Exit Planning Advisor, Accredited Investment Fiduciary®, and Certified Plan Fiduciary Advisor®.

The Diamond Group Wealth Advisors provides personalized financial guidance for each client who goes through life's transitions. Our advisors have a special sensitivity to women in transition.

"At these difficult times, a trusted advisor can add to a woman's sense of confidence, security, and support. Our firm is dedicated to the special needs of women in these times and beyond," she said. "Financial success is a goal for many, and women may face unique barriers that make their goals more challenging to achieve."

CEPA's value acceleration methodology provides a tool to value a business properly.

"Most business owners don't receive fair compensation when selling their businesses. That's because they don't know how to value their businesses and don't take steps to prepare their businesses to be sold—a process that should begin years before the business needs to be sold," she said. "For women, this is a particular problem because they are so focused on building their businesses, they don't look ahead to the day when they want or need to sell their businesses."

"CEPA helps me to understand the options business owners have when they sell their business. It provides insight into how business owners think so I can ask better questions and discuss more relevant topics," she said.

People who earn the CEPA credential have a deeper and more holistic conversation with business owners.

Recent studies show that 51% of the current American business market is owned by Baby Boomers, who are set to transition over the next zero to ten years. Statistics also show that only 20 to 30% of businesses that go to market actually sell; leaving up to 80% of those without solid options to harvest their wealth and ensure economic continuity into the next generation. An owner who is "ready" with an attractive business greatly increases the odds that the business will survive a transition of hands. The question is, how ready are business owners?" according to the Exit Planning Institute.

Despite this need, many owners still lack a formal transition team, highlighting the ongoing need for comprehensive support, the group said.

About the CEPA Program

Over the past decade, education and awareness surrounding exit planning have significantly improved, indicating increased readiness among business owners. While financial readiness ranks highest among respondents, the presence of estate plans remains consistently lower, suggesting a need for further investment and education in this area by management consulting and accounting professions. The data underscores the importance of ongoing education and proactive planning in facilitating successful business exits, highlighting the pivotal role of advisors in empowering owners to take action towards long-term value creation and legacy planning, thereby shifting exit planning from a future event to a present-tense imperative.

The Certified Exit Planning Advisor® (CEPA) Program is the only program of its kind. This program offers professional advisors an innovative learning experience, performance-enhancing resources, and strategic tools to help them advance their exit planning practice.

For information, go to <https://exit-planning-institute.org>

About The Diamond Group Wealth Advisors

The Diamond Group is an independent wealth management firm that empowers its clients to design their ideal lifestyle starting today, for tomorrow, and for life.

We believe "Your Wealth Is More than Your Money."

Our approach to building your customized plan honors what matters to you most. Your motivations, aspirations, and the causes you care about deeply.

Our core values are trust, commitment, compassion, and collaboration.

For your complimentary Lifestyle Upgrade Assessment, contact Marilyn at 925-219-0080 or email marilyn.suey@diamondgroupwealthadvisors.com.

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the certification mark CERTIFIED FINANCIAL PLANNER TM and CFP® (with plaque design) in the United States, which authorizes the use of individuals who successfully complete the CFP Board's initial and ongoing certification requirements.

Marilyn Suey is a Registered Representative with a Securities and Retirement Plan Consulting Program advisory services offered through LPL Financial, a registered investment advisor, and a member of FINRA/SIPC. Other advisory services are offered through Mariner Independent Advisor Network, LLC, a Registered Investment Advisor. Mariner Independent Advisor Network, LLC and The Diamond Group Wealth Advisors are separate entities from LPL Financial. CA Insurance License #0E01981

For information, go to <https://www.diamondgroupwealthadvisors.com>

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View original content to download multimedia:<https://www.prnewswire.com/news-releases/marilyn-suey-cfp-earns-the-highly-coveted-certified-exit-planning-advisor-cepa-credential-to-help-women-sell-their-businesses-at-maximum-value-302311543.html>

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Quote Lookup

U.S. markets closed

US	Europe	Asia	Rates	Commodities	
S&P 500 6,052.85 -37.42 (-0.61%)	Dow 30 44,401.93 -240.59 (-0.54%)	Nasdaq 19,736.69 -123.08 (-0.62%)	Russell 20... 2,392.84 -16.16 (-0.67%)	Crude Oil 68.11 -0.26 (-0.38%)	Gold 2,683.30 -2.50 (-0.09%)

MY PORTFOLIOS

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TOP GAINERS

RSMD	22.75	ResMed Inc.	+5.05 (+28.53%)
BILI	23.21	Bilibili Inc.	+4.13 (+21.65%)
PTVE	17.36	Pactiv Evergreen ...	+2.68 (+18.26%)
FUTU	98.08	Futu Holdings Li...	+14.81 (+17.79%)
PONY	14.53	Pony AI Inc.	+1.93 (+15.32%)

TOP LOSERS

AGIO	48.64	Agios Pharmace...	-13.00 (-21.09%)
APP	342.54	AppLovin Corpor...	-58.96 (-14.68%)
RIOT	11.21		

Quote Lookup

ZETA
Zeta Global Hold...
-3.21 (-12.26%)

MOST ACTIVE

LCID	2,550.00	Lucid Group, Inc.	+0.2500 (+0.87%)
PLTR	72.46	Palantir Technolo...	-3.88 (-5.08%)
NVDA	138.81	NVIDIA Corporat...	-3.63 (-2.55%)
SOUN	15.06	SoundHound AI, ...	+0.05 (+0.33%)
NIO	5.18	NIO Inc.	+0.57 (+12.36%)

TRENDING TICKERS

ORCL	190.45	Oracle Corporation	-1.24 (-0.65%)
AI	41.68	C3.ai, Inc.	+1.16 (+2.86%)
MDB	350.13	MongoDB, Inc.	+6.73 (+1.96%)
AMD	130.87	Advanced Micro ...	-7.72 (-5.57%)
MGX	4,170.00	Metagenomi, Inc.	+2,320.00 (+125.41%)

TOP ECONOMIC EVENTS United States

Employment Trends*
Dec 9, 2024, 10:00 AM EST Prior: 108.25New: 109.55

Mortgage Market Index
Dec 11, 2024, 7:00 AM EST Prior: 213.9 New: -

MBA 30-Yr Mortgage Rate
Dec 11, 2024, 7:00 AM EST Prior: 6.69 New: -

CPI Index, NSA*
Dec 11, 2024, 8:30 AM EST Prior: 315.66New: -

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