Syllabus for Continuing Education Program

Program Provider:	NAIFA - Minnesota 4707 Highway 61, N, #181, White Bear Lake, MN 55110 651.815.0668 | Info@naifa-mn.org | www.naifa-mn.org
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Program Chair:	Robert Hanten, MRFC LUTCF FICF 763-591-0405 | rjhanten@solidarityfinancial.com
Event:	Lunch & CE | In-person
Title:	Exit Planning: A Guide to the Process
Speaker:	Dyanne Ross-Hanson, ChFC, CLU, CFP® CEPA, Exit Planning Strategies, LLC drh@exitplanstrategies.com l www.exitplanstrategies.com
Date:	Thursday, November 12, 2026
Location:	Midland Hills Country Club, 2001 Fulham Street, Roseville, MN 55113
Time:	11:30 AM Attendee arrival 12:00 PM Lunch served 12:10 PM Welcome and announcements 12:30 PM CE Presentation 1:30 PM Meeting ends
Attendance Fees:	All Attendees: $25 Sponsors: Per sponsor benefit package Refunds: No refunds for cancellations received after 11/6/2026 or for no show attendees.
CE Credits:	This educational offering is **APPROVED** by the Minnesota Commissioner of Commerce as satisfying 1.0 hours of STANDARD classroom credit toward continuing insurance education requirements. CFP: 1.0-hour Standard credit **APPROVED**. CLE: 1.0-hour Standard credit **PENDING.** A certificate of attendance is available for individuals requesting CPE and PRP (Professional Recertification Program – formerly PACE) credits.
Who Should Attend:	Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs.

Level of Educational Complexity: Overview

Course Description

Every business owner will leave his/her company at some point, voluntarily or otherwise. Most are so consumed working "in" their businesses they forget the need to work "on" their business's Exit/Succession Plan. Transitioning ownership is generally *the most significant financial event* in a business owner's life. And it takes years to prepare. This program will help educate advisors on a proven process used to develop a written Exit Plan and highlight common mistakes to avoid.

Learning Objectives

- Discover a Seven Step Process™ needed to design a comprehensive Exit/Transition Plan.
- Identify the advantages of an experienced Advisory Team when executing an Exit/Transition Plan.
- Explore issues surrounding valuation, tax minimization, value enhancement, challenges facing "internal" and "external" transitions, importance of having a "back-up" plan, and legacy/estate planning techniques.

Outline

Time	Min.	Content
0:00-0:05	5	**Introduction and need for exit planning.** Owner demographics, transition readiness, and business wealth transfers.
0:05-0:10	5	**Framework and Step 1.** Seven-step process, exit objectives, timing, financial requirements, and transition paths.
0:10-0:17	7	**Step 2 Financial Resources.** Company valuation, personal resources, and an illustrative wealth gap.
0:17-0:25	8	**Step 3 Business Value.** Value drivers, transferability, and cash-based key employee incentive and retention plans.
0:25-0:32	7	**Step 4 Third Party Sale.** Pre-sale planning, quality of earnings, qualified buyers, deal benchmarks, and net proceeds.
0:32-0:39	7	**Step 5 Internal Transition.** Transfer structures, successor readiness, cash-flow financing, and seller security.
0:39-0:51	12	**Step 6 Business Continuity.** Five D's, sole and multiple owners, buy-sell agreements, Connelly, and funding alternatives.
0:51-0:56	5	**Step 7 Wealth and Estate Planning.** Family security, estate alignment, federal and Minnesota exclusions, and advisor roles.
0:56-1:00	4	**Key takeaways and questions.** Coordinated implementation and attendee questions.
Total	**60**	**60-minute presentation, including questions.**

Instructional Materials for Registered Attendees: Handouts if any will be included in the confirmation email to registered attendees. **Examination & Answers:** No exam

About the Speaker



Dyanne Ross-Hanson is President/CEO of Exit Planning Strategies, LLC. Dedicated to offering owners, and their advisory team independent, outcome agnostic, financial guidance in the development of intentional, comprehensive, written exit plans. Ideally 3-5 years prior to departure in time and/or capital. Helping to educate, evaluate and formulate an *intentional* plan for ownership transition. Complete with an Action Checklist. With expertise in designing "internal" transitions, key employee incentive/retention plans and business continuity.