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## **Bartlett Wealth Advisor, Principal Earns Esteemed CEPA Designation**

*Jason Katz receives CEPA Designation from Exit Planning Institute*

**Cincinnati** (August 20, 2019) – Bartlett Wealth Management, a leading Midwest wealth management firm, is pleased to announce that Wealth Advisor and Principal Jason Katz has earned the Certified Exit Planning Advisor (CEPA) designation after completing the Institute’s intensive MBA-style program. Katz is also a Certified Public Accountant (CPA) and Certified Financial Planner™ (CFP).

Katz joins an elite group of business advisors who’ve received the designation and are a part of the Exit Planning Institute’s international community of CEPAs. The program is the most widely-accepted and endorsed professional exit planning program in the world.

Smart business owners rely on CEPA-certified wealth managers to evaluate their personal and professional goals, calculate their business value, and help them choose the right time to step away from their company and ensure its success into the future. Bartlett is pleased to add this much-needed service to their list of service offerings for clients.

### **ABOUT THE CEPA PROGRAM**

The Certified Exit Planning Advisor program was specifically designed for business advisors who work closely with owners of privately held companies. The organizing principle of the program is Master Planning, the alignment of the three legs of the stool (business, personal, financial), which is executed through the implementation of a process called the Value Acceleration Methodology™. Using an executive MBA-style format, the program includes a combination of lectures, group discussions, case studies and individual exercises to introduce participants to these concepts and to reinforce skills. The program is taught by the Exit Planning Institute’s faculty of advisors, who are all sought after subject matter experts and authors.

To receive the CEPA designation, Katz completed the rigorous 4-day program that involved approximately one hundred hours of pre-course study, thirty hours of classroom instruction, and the successful completion of a 3-hour proctored exam.

### **ABOUT BARTLETT WEALTH MANAGEMENT**

Bartlett Wealth Management (“Bartlett”) a leading Midwestern wealth management firm with offices in Cincinnati and Chicago, provides customized investment management and financial planning services to high net worth families, foundations and businesses throughout the Midwest. Bartlett takes pride in providing clients independent, personalized fiduciary advice through a team of distinguished investment and planning professionals. For more information, visit [www.Bartlett1898.com](http://www.Bartlett1898.com).

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