

How Smart Business Owners Use Risk Management to Protect Wealth Before an Exit

Madison Insurance Group Sponsors the 2025 Exit Planning Summit, Bringing Business Owners Critical Strategies for a Secure Transition

SAN JUAN, PUERTO RICO, March 6, 2025 /EINPresswire.com/ -- For business owners, exiting a company is one of the biggest financial moments of their lives. The decisions made in the months—or years—leading up to that transition determine whether the sale sets them up for lasting financial security or leaves them exposed to unnecessary risk.



Mark Sims Speaks at Madison Insurance Group conference November 2024

That's why Madison Insurance Group is sponsoring the 2025 Exit Planning Summit, the premier event for advisors helping business owners maximize value and align financial strategies ahead of an exit. Hosted by the Exit Planning Institute® from May 4-6, 2025, in Charlotte Harbor, Florida, the Summit will bring together industry leaders to discuss how business owners can protect their wealth and manage financial risk before a sale.

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Mark Sims, President Madison Insurance Group

Most business owners focus on valuation and deal structuring when preparing for an exit. But one of the biggest threats to financial security isn't just getting the best price—it's protecting what's already built.

“We see business owners spend years growing their companies, only to face unexpected financial exposures right before a sale,” says Mark Sims, President of Madison Insurance Group. “The right risk management strategy can help owners preserve wealth, create liquidity, and safeguard assets, so they're financially secure long after they exit.”

At the Summit, Mark Sims will lead a session on turning insurance and risk management expenses into financial assets, a game-changing strategy for business owners looking to protect their net worth during a transition.

Why Business Owners Need to Pay Attention

The Exit Planning Summit is designed to provide business owners and their advisors with practical tools to build and protect wealth before, during, and after a sale. Sessions will cover everything from succession planning to tax-efficient exits, and risk management is a key piece of that puzzle.

“The Exit Planning Summit brings together a collaborative community of multi-disciplinary professionals aligned in purpose - building (and transferring) significant companies,” said Josh Koza, Director of Strategic Relationships for the Exit Planning Institute. “This mission could not be achieved without the support of a robust partner network providing valuable, complementary solutions for advisors to better serve their business owner clients. As a multi-year partner of the Exit Planning Summit, Madison Insurance Group continues to fuel the community with unique risk-mitigation strategies, helping to secure the future legacy of businesses around the country!”

For business owners planning an exit, the stakes couldn't be higher. Madison Insurance Group's sponsorship of the 2025 Exit Planning Summit underscores the growing need for proactive financial strategies that don't just focus on selling a company—but on securing the wealth it creates.

For more information on Madison Insurance Group and its risk management strategies, visit www.madisoninsurancegroup.org.

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About Madison Insurance Group

Madison Insurance Group is a leader in enterprise risk management and alternative insurance solutions, specializing in insuring business revenue and mitigating financial disruptions. With a focus on protecting against catastrophic risks and optimizing financial strategies, Madison Insurance Group helps business owners safeguard their future while maximizing financial efficiency. For more information, visit online at: www.madisoninsurancegroup.org

About The Exit Planning Institute

The Exit Planning Institute® was founded in 2005, and the Certified Exit Planning Advisor (CEPA®) credentialing program was launched in 2007. The CEPA® credential relates to the technical skills of advisors who work with business owners. EPI is committed to providing the best exit planning content in the industry, ongoing practice support for advisors, and connectivity to business owners. CEPA is the fastest-growing and most widely accepted exit planning credential in the

world.

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