

For Immediate Release

Contact: Paula Steurer

Sterling Public Relations

Direct: 949. 200. 6566

Paula@SterlingPublicRelationsOC.com

Letitia Berbaum Earns CEPA Designation

Letitia Berbaum, COO and Wealth Advisor at The Zandbergen Group, has expanded her expertise to include Exit Planning for business owners who are looking to transition effectively

Laguna Beach, CA: Letitia Berbaum has earned her Certified Exit Planning Advisor (CEPA) certification. A founding partner at The Zandbergen Group, Letitia values the opportunity she has to assist business owners who are looking to sell or transition their business successfully. In the exit planning process, Letitia is able to assist clients with a variety of planning components including how to maximize business value and life after business planning.

“My goal is to help business owners develop an efficient and comprehensive exit plan that can serve as a runway for these entrepreneurs – propelling them into their next personal or professional chapter,” says Letitia.

Letitia’s leadership and expertise have been showcased recently in her guest appearance at the RIA Summit in Los Angeles, hosted by Portfolio Summits, and in her engagement at the NAWRB 2022 Symposium where she was recognized as a [Leadership Award Winner](#).

About The Zandbergen Group:

The Zandbergen Group offers sophisticated financial planning and investment solutions that are specifically aligned with their client’s interests and goals. Letitia Berbaum, COO and wealth advisor, specializes in wealth management, asset transfer strategies for high net worth individuals and multi-generational families, and full-service strategic planning for business owners. She has been recognized as an outstanding wealth manager in several publications and has been named as an Orange County Five-Star Wealth Manager for seven consecutive years. Letitia has earned the Accredited Investment Fiduciary® (AIF®) designation and holds both Series 7 and 66 securities registrations as well as Long Term Care Insurance, Life & Health, and Insurance licenses. Additionally, she is serving on the Brea Chamber of Commerce Women’s Leadership Council. Collectively, The Zandbergen Group is dedicated to helping clients discover true wealth and is located at 32322 South Coast Hwy, Suite D, Laguna Beach, California.

The Zandbergen Group offers advisory services through Axxcess Wealth Management, LLC, a Registered Investment Advisor with the SEC. Axxcess does not warrant the accuracy or completeness of the information contained herein. Opinions are our current opinions and are subject to change without notice. Generally, investments are NOT FDIC INSURED, NOT BANK GUARANTEED, and MAY LOSE VALUE. To get more information about the recognitions mentioned, click [HERE](#).

The Certified Exit Planning Advisor™ and CEPA® are professional certifications marks granted by The Exit Planning Institute®. It is recognized as the designation that business owners look for when looking for a trusted advisor. CEPA® applicants must meet strict requirements, including a minimum of a bachelor’s degree from an accredited U.S. college or university (or the equivalent from a foreign university); completion of the 5-day CEPA® program taught by a faculty of experts; and passing the CEPA® exam consisting of 150 multiple-choice questions. Applicants must also have five years of experience dealing with the owners of privately-held businesses in some advisory capacity. All applicants for the CEPA® program must sign an attestation agreeing to abide by the Code of Ethics and Professional Standards™ of the Exit Planning Institute.

CEFA® advisors must complete ongoing continuing professional education and ethics requirements to maintain their certification, with recertification every three years and completing 40 hours of continuing education. More information on the CEPA® designation can be found on the Exit Planning website: www.exit-planning-institute.org

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