



# DIAMOND STATE FINANCIAL GROUP

## Business News at Diamond State Financial Group

121 Continental Dr., Suite 110, Newark, DE 19713

[www.dsfg.com](http://www.dsfg.com)

Contact: Carol York, Tele. 302.366.0366

**For Immediate Release – September 14, 2020**

## **DAVID TATE earns Certified Business Exit Consultant® Designation**

**NEWARK, DE (September 14, 2020) – Diamond State Financial Group is pleased to announce that David Tate** recently earned the Certified Business Exit Consultant® Designation from the International Exit Planning Association (IEPA). The Certified Business Exit Consultant® Designation is a significant achievement and further establishes David Tate as an expert exit planner in the marketplace today.

To receive the CBEC® Designation, David completed the high-level nine week training program that required 30+ hours of pre-course study, 32 hours of extensive, leading edge curriculum taught by top expert instructors in their respective fields as well as the successful completion of the final exam. As an additional requirement for the CBEC® Designation, David delivered an exit plan to an owner and submitted that plan to the IEPA's Certification committee for review. The quality and the brand of the IEPA's CBEC® Designation requires this type of process. Holding graduates to this standard ensures the IEPA that any advisor in the marketplace with the CBEC® designation has not only gone through their extensive Certification course and pre-work, but they have also taken an owner through this process and delivered the type of solution that the IEPA expects from their advisors.

### **The International Exit Planning Association's CBEC Designation Program**

The emerging field of exit planning requires that our Certified Business Exit Consultant® graduates not only learn the material but are also well-equipped to go out into the marketplace and deliver the exit planning services to exiting owners. In order to have a comprehensive approach to an owner's needs, an advisor or consultant must have a solid plan to message this unique service to an exiting owner as well as sell and service the exit planning engagement. The CBEC® Designation is designed to deliver this combination of training and skills through our rigorous curriculum, live practice management training and ongoing support.

David Tate is a Registered Representative and Investment Advisor Representative of Securian Financial Services, Inc.

Working with this individual is not a guarantee of future financial results. Investors should conduct their own evaluation. 3232957 09.2020

121 Continental Drive, Suite 110, Newark, DE 19713 | P: 302.366.0366 | F: 302.454.9405

200 E. State Street, Suite 303, Media, PA 19063 | P: 610.565.9550 | F: 610.892.0822 | [www.dsfg.com](http://www.dsfg.com)

Diamond State Financial Group offers securities and investment advisory services through Securian Financial Services, Inc., member FINRA/SIPC.

Diamond State Financial Group is independently owned and operated.