

WH Cornerstone Investments Co-Founder, Bill Harris, Earns CEPA® Designation

Strengthens Commitment to Client Wealth and Business Succession Planning

Duxbury, Massachusetts Dec 20, 2024 ([Issuewire.com](https://www.issuewire.com)) - WH Cornerstone Investments, a boutique wealth management firm, is proud to announce that Co-founder Bill Harris, CFP®, RMA®, has earned the designation of Certified Exit Planning Advisor (CEPA®), further solidifying his commitment to helping business owners successfully plan and execute their exit strategies.

The CEPA designation, offered by the Exit Planning Institute (EPI), equips financial professionals with the expertise to assist business owners in preparing for the complex process of transitioning out of their businesses. This new designation positions Harris to offer even greater support to entrepreneurs looking to preserve their wealth and maximize the value of their businesses during exit planning.

“Becoming a CEPA® is a natural extension of my work in financial planning,” said Harris. “I’m excited to guide business owners through the intricate decisions surrounding their business exit, helping them preserve their wealth, pass on a lasting legacy and figure out what they are retiring to in this next phase of life.”

A seasoned financial expert with over 35 years of experience in the financial services industry, Harris co-founded WH Cornerstone Investments in 1996 with a vision of providing independent investment research and wealth management solutions. His latest accomplishment as a CEPA® adds to a list of already impressive credentials, including being a CERTIFIED FINANCIAL PLANNER™ Practitioner, a Retirement Management Advisor® (RMA®), and an Ed Slott Elite IRA Advisor.

As a thought leader in the field of financial planning, Harris is frequently lecturing on the topic and contributing to various publications, including a regular column on TheStreet.com. He is also the author of *Inheriting Your Spouse’s IRA: The Widow’s Guide to Keeping More of Her Assets*.

For more information on Bill Harris and the services offered by WH Cornerstone Investments, please visit www.whcornerstone.com or contact Paula Harris at pharris@whcornerstone.com.

About WH Cornerstone Investments

Founded in 1996, WH Cornerstone Investments is a wealth management firm based in Duxbury, MA. With four decades of experience, co-founders Bill Harris, CFP®, RMA® and Paula Harris have seen that life throws many curve balls. From wealth management to exit planning strategies, WH Cornerstone is passionate about empowering clients and their financial future.

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Source : WH Cornerstone Investments

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