



JUSTIN GOODBREAD

CFP®, CEPA®, CVGA®

SUGGESTED SPEAKING TOPICS:

- 3 Ways to Increase Your Business' Long-term Value
- Why Business Value is More Important Than Business Profitability
- Is Your Business Ready to Sell?
- 10 Key Things Buyers and Investors Look for When Assessing Your Business
- Plan Your Exit the Moment You Begin Your Business
- Stop working IN your business and start working ON your business

RECENT APPEARANCES:

- Nerd's Eye View Podcast with Michael Kitces
- Financial Strategies for Healthcare Professionals Conference, Mahan & Associates LLCT
- Exit Planning Institute Platform Speaker
- University of Tennessee MBA Finance Dept. Speaker
- Your Personal CFO podcast
- Influential Entrepreneurs podcast
- Sell or Die podcast
- Capitalism.com podcast
- The Playbook podcast
- Goals-Based Advice podcast
- The Journey is Real Podcast

CONTACT & CONNECT:

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FINANCIAL EDUCATOR, AUTHOR, BUSINESS GROWTH ADVISOR, WEALTH MANAGER, SPEAKER, ENTREPRENEUR

Justin Goodbread, CFP®, CEPA®, CVGA®, owner of Heritage Investors and FinanciallySimple.com, is a nationally recognized financial planner, financial educator, wealth manager, author, speaker, and entrepreneur. Armed with 20+ years of experience starting, buying, growing, and selling businesses, Justin has a passion for helping fellow business owners across the country increase and manage the value of their businesses and personal assets.

In 2009, Justin opened Heritage Investors, a boutique-style wealth management and financial planning company. Justin quickly realized that his combined experience in business and wealth management provided him with the ability to help fellow small business owners in unique and invaluable ways.

In 2016, Justin launched the FinanciallySimple.com enterprise educational portal to help guide owners navigate topics such as dealing with day-to-day business headaches and growing the sellable value of their company. Justin's innate ability to educate in "financially simple" terms has caught the eye of several different industry organizations including the Exit Planning Institute who awarded him Leader of the Year and Investopedia who has named him one of their Top 100 Financial Advisors for four consecutive years.



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PLAYER FM TOP 20
FINANCIAL ADVISOR PODCASTER

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For more information about how these awards are chosen, visit HeritageInvestor.com/awards.