

WealthSource Acquires Heritage Investors, Heritage Business Advisors and Financially Simple

Three-time Investopedia “Top 100 Financial Advisor” honoree, Justin Goodbread, transitions three businesses to WealthSource as he joins the leadership team

SAN LUIS OBISPO, CA, USA, March 3, 2022 /EINPresswire.com/ -- [WealthSource Partners](#) today announced the addition of seasoned business coach and financial advisor, [Justin Goodbread](#), CFP®, as Chief Strategy Officer. The acquisition of Heritage Investors, LLC and its affiliates, [Financially Simple, LLC](#) and Heritage Business Advisors, LLC, all based in Knoxville, TN, will bring seven team members to the firm.



Justin Goodbread, CFP®, CEPA, CVGA

The Heritage family of companies is more than a traditional financial advisory firm. With a focus on working with business owners with illiquid assets, Heritage builds customized plans for business owners that position them to grow their net worth and the value of their business while Financially Simple, a suite of digital resources and educational content, provides business owners with resources to grow their companies to their maximum value and to guide them toward a successful exit.

“As a serial entrepreneur, my passion is to empower fellow business owners to make their dreams a reality by offering practical advice and strategies to maximize the value of their businesses and personal assets,” said Goodbread. “At WealthSource, I found a firm with bespoke investment strategies and a strong infrastructure that will help scale my practice — while supporting existing clients in their pursuit to become, and stay, financially secure.”

One of the leading voices in the financial services industry on financial planning for business owners, Goodbread has earned the Certified Exit Planning Advisor credential and the Certified



In his role, Justin will help us reimagine what's possible — for us as a wealth management firm, and for our clients.”

Jon Dubravac, WealthSource

Value Growth Advisor certification. He is a past honoree of Investopedia's Top 100 Financial Advisors list, was the Exit Planning Institute Leader of the Year for 2018 and is a member of the Forbes Finance Council.

Goodbread partnered with WealthSource because he was drawn to its community of like-minded advisors and its innovative marketing and practice management team. In his role as Chief Strategy Officer, Goodbread will be a

leading voice for the firm and will play a critical part in building on the firm's strategy to establish WealthSource as one of the nation's fastest-growing RIAs.

“Adding a seasoned entrepreneur of Justin's caliber to our leadership team immediately augments our established expertise and ingenuity,” said Jon Dubravac, Chief Business Development Officer, WealthSource. “In his role, Justin will help us reimagine what's possible — for us as a wealth management firm, and for our clients.”

In addition to founding the Heritage family of companies, Goodbread has authored two books about maximizing the value of businesses titled *The Ultimate Sale* and *Your Baby's Ugly* and is an established public speaker on the subject of exit planning and business value growth. His niche background and abundant experience in both wealth management and marketing will help spread WealthSource's mission to allow advisors the opportunity to reclaim their focus, grow their practices, and help more families by tapping into institutional-level platforms and resources.

Interested in having a conversation about joining the fast-growing WealthSource team? Don't hesitate to email Jon Dubravac (jdubravac@wealthsource.com) to get the conversation started.

About WealthSource Partners

WealthSource Partners is a full-service, national, independent registered investment advisory firm. The firm's partnered independence platform serves entrepreneurial advisors who are eager to grow, and to do so on their own terms. Supported by an experienced practice management, marketing and operations team, WealthSource Partners empowers advisors to focus on their niche and the unique elements of their practice. Through the Advisor Platform Management Office (AdvisorPMO), WealthSource's robust practice management and marketing platform, advisors can simplify their day-to-day and offload non-client-facing activities to spend more time serving clients and engaging prospects. For more information on what WealthSource is building, please visit wealthsource.com or contact us at jdubravac@wealthsource.com.

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