

# Financial Consultant Linda Jensen of the Heart Financial Group Recently Featured on Close Up Radio

OLYMPIA, WA, UNITED STATES, July 6, 2026 /EINPresswire.com/ -- Business consulting is far too often mistaken for a numbers game. Headlines tout tax strategies, exit plans and impressive market projections. Yet, for one financial professional, the real work goes much deeper. The heart of Linda Jensen's consulting practice, the Heart Financial Group, is not about chasing the latest economic trends or squeezing out another percentage point in annual returns. Instead, her mission is grounded in a concept far more essential: protection.

"Most people assume financial planning is about investing or growing money," Jensen admits. "In reality, Heart Financial helps people avoid

chaos and find peace of mind. Clients want to know they are prepared for the unexpected. They want to know their spouse, family, business and futures are safeguarded. Tax planning means financial safety. Retirement planning means future security. Estate planning protects families. Even business strategies are about making companies less vulnerable to unexpected events."

## A Life Built on Guarding Against Chaos

As a child, Jensen became a caretaker long before most kids learn how to pack a lunch. In a home where chaos was ever-present and safety was uncertain, she learned firsthand the cost of being unprotected and unprepared. Those early years forged instincts that would shape her life's work. Today, whether she is guiding business owners, families or retirees, her focus is always on creating financial, organizational and personal safety.



Drawing on experiences that include shielding younger siblings from violence and hardship, Jensen learned that the true currency of security is knowledge, preparation and planning. Her professional path is a natural outgrowth of those lessons. Instead of shying away from the difficulties of her past, she leverages them to help her clients shape a future defined not by where they began, but by the possibilities that lie ahead.

Jensen explains, "Circumstances influence us, but they do not have to define us. I help clients build better futures regardless of where they are right now." For Linda, business consulting has never been just about assets or numbers. Every conversation is about understanding each client as a whole person, prioritizing safety and security above all else.

### Beyond Numbers: The Role of True Financial Planning

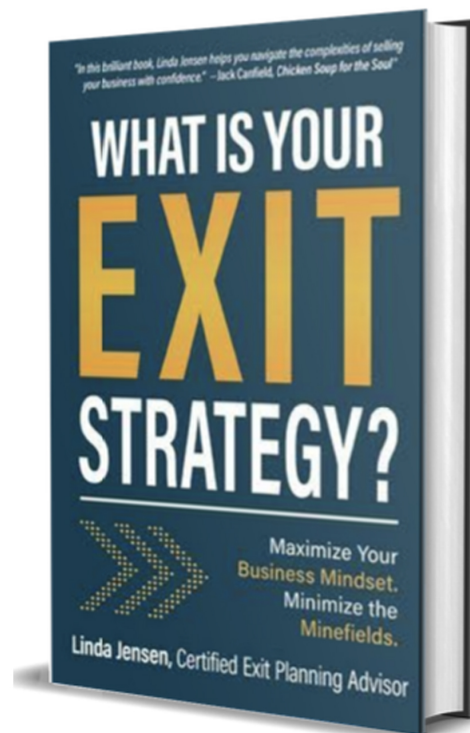
Her philosophy redefines standard expectations for financial professionals. Tax planning becomes a tool for securing financial safety. Retirement planning is about ensuring clients will not outlive resources. Estate planning, business planning, insurance and exit strategies are treated as ways to create stability and shield her clients from chaos.

"We are not selling financial strategies.

We are helping our clients build lives, businesses and families that are less vulnerable to chaos." Jensen's approach is holistic, deeply empathetic and rooted in education. Passing over 30 industry exams, her achievements include Certified Financial Fiduciary (CFF), Chartered Life Underwriter (CLU) and Chartered Financial Consultant (ChFC). "The more I know, the more I can



# HEART FINANCIAL GROUP



pass on to my clients," she asserts.

Every client is given the knowledge to fully understand their options and the consequences of their choices. According to Jensen, "Financial decisions are interconnected. Healthcare costs affect investments; taxes affect retirement income; and estate planning affects families."

With the Heart Financial Group, retirement is approached with the the big picture in mind. "We look at longevity risk (retirements lasting 25 to 35 years), inflation, tax increases, market volatility, long-term care costs and even what it means to survive your spouse," Jensen shares.

### Building Businesses That Outlast Their Owners

Her experience with business owners reveals a startling truth: About 80 percent of businesses never sell, often because they are too dependent on the owner. As a Certified Exit Planning Advisor (CEPA), Jensen guides clients through the process of building systems and processes to make their organizations viable and valuable, even when her clients are not at the helm. She advocates for a "value acceleration methodology," which tailors solutions to each business, increasing both profitability and the potential sale value.

For those planning succession, the Heart Financial Group offers experienced advice on everything from buy-sell agreements to strategies for mitigating capital gains and estate taxes. Jensen is quick to note the emotional complexities of exiting a business, especially with baby boomers for whom their companies are both identity and legacy. Her consulting process always considers both financial readiness along with the personal side of transition.

### Holistic Planning for Retirement and Beyond

In addition to exit strategy consulting, the Heart Financial Group specializes in comprehensive retirement planning, which includes Medicare advice, guidance on long-term care, risk mitigation and legacy planning for surviving spouses. Because Jensen is particularly attentive to the silent risks of retirement (longevity, inflation, market swings, withdrawal timing, rising taxes and the realities of long-term care), her firm's strategies are always tailored to face these challenges head-on.

Jensen insists on maintaining the highest ethical standards. As a Certified Financial Fiduciary, she is legally obligated to always act in her client's best interest in mind. Her clients range from profitable business owners to couples planning for retirement. She works nationwide, delivering her signature blend of expertise, empathy and education.

With over 33 years of experience providing financial services that include:

- retirement planning,
- tax planning,
- estate planning,

- business succession,
- risk management, and
- legacy planning

Jensen works hard to help retirees, business owners, professionals, and families across the United States create and enjoy true financial security.

“What is Your Exit Strategy?”

Jensen’s book, “What is Your Exit Strategy?” evolved while achieving her certifications. Coming across research published by the Exit Planning Institute, she learned that 80% of businesses do not sell, 50% sell involuntarily due to the five Ds (disability, death, divorce, disagreement, duress), and only 20% sell successfully — setting up the business world for succession crisis. Without change, business owners are slated to lose an estimated \$14 trillion in wealth trapped within their own companies. Topics include owner dependency, the five Ds, succession options like ESOPs, along with ways to maximize business value. “What is Your Exit Strategy” provides stories, practical concepts and outlines of strategies without overwhelming readers with technical “how-to” checklists. The book is designed to help business owners prepare for both planned and unexpected transitions with clarity and confidence.

About Heart Financial Group

Heart Financial Group is a holistic consulting and wealth management firm based in Washington State that serves clients nationally. The firm specializes in business planning, exit strategies, tax planning, estate planning, retirement solutions and risk management. Jensen’s expertise has been featured in national publications (including Forbes, Fortune, Kiplinger, CNBC, and others), and she frequently speaks on retirement, tax and exit planning. Linda Jensen and the Heart Financial Group are committed to helping business owners, professionals and retirees create financial security, safety and peace of mind.

Close Up Radio recently featured Linda Jensen, founder of the Heart Financial Group, in a three-part interview with Doug Llewelyn on Tuesday June 30th at 12pm Eastern, Wednesday July 1st at 12pm Eastern, and Thursday July 2nd at 12pm Eastern

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For more information about Linda Jensen, please visit <https://heartfinancialgroup.com/>

Lou Ceparano

Close Up Television & Radio

+ +1 631-850-3314

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