

FINANCIAL LEADERS

Boutique Financial Planning Firm Counts Clients as Friends

Heritage Investors

Talk with Justin A. Goodbread, CFP® and it's easy to see why Heritage Investors is a different kind of wealth advisor, starting with its birth in a coffee shop.

Goodbread and firm co-owner Jim L. De Tar, CFP® both had large-firm experience when they got together over java and talked about what kind of wealth management firm they'd like to create. Then they created it.

"He and I basically said we wanted to build a referral-based firm," says Goodbread. "We wanted to have more of an intimate relationship with our clients. Where we're friends on social media, where we meet with clients three, four, five times a year, not just the once-a-year conference."

Fishing and Planning

Heritage Investors is a boutique financial planning practice. The firm's aim is to grow with clients and help them attain their goals long term. "Most of my relationship-building time spent with clients, we're typically hunting, fishing, playing golf or other activities," Goodbread says. "My business partner, he likes to socialize, and he'll take a client out for dinner and entertainment. That's

probably what sets us apart more than anything – our clients are our friends. It's a little different, but we've built the business that way."



Jim L. De Tar



Justin A. Goodbread

"We have a lot of clients who say, 'Look, we're not interested in a written, cookie-cutter plan. We want customization. We need some help. We need guidance.' We then construct the investment portfolio to fit the client's goals and objectives."

Spirited Discussion

The owners are different ages, backgrounds and beliefs. They bring different perspectives to the advisor/client relationship. When clients meet with them and ask their thoughts, they sometimes disagree, and this give-and-take is a way to arrive at the best solution. It's a process that helps clients feel more

comfortable and informed, Goodbread says. "They're watching two professionals who they know and trust give them alternative views on a particular matter. We talk it through and build consensus. Clients welcome our opposing viewpoints and feel they have significant input into their financial future. We help our clients build and manage their investment portfolios."

Fishing trips. Debates. Teamwork. Not the usual financial advisory. It's easy to see what clients like in a boutique firm designed in a coffee shop.

"We help our clients build and manage their investment portfolios."

– Justin A. Goodbread, CFP®

Heritage Investors, opened in April 2009, welcomes referrals. Prospective clients meet with both Goodbread and De Tar, and the advisors interview them about where they are financially and what they want to achieve. Goodbread says,



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