

From Credentialed to In Demand: The Positioning and Client Selection Strategy Behind the Value Acceleration Methodology



JUSTIN GOODBREAD



JUSTIN GOODBREAD

CEO, Relentless Value Coaching
International Speaker & Best-Selling Author

CEPA · CFP® · CVGA



@justingoodbread



@justingoodbread



@DecaMillionaireDecoded



Your Baby's Ugly (Best-Seller)



DecaMillionaire Decoded Podcast



ABOUT YOUR SPEAKER

20+ Years in Financial Services

Justin Goodbread is a Certified Exit Planning Advisor (CEPA), Certified Financial Planner (CFP®), and Certified Value Growth Advisor (CVGA). With over 20 years in financial services, Justin built and sold multiple firms, reached decamillionaire status, and now teaches independent advisors to rapidly scale their practices for more money, impact, and freedom.

"From \$250K/year and stuck — to 8-figure exit and helping others do the same."

REFLECTION

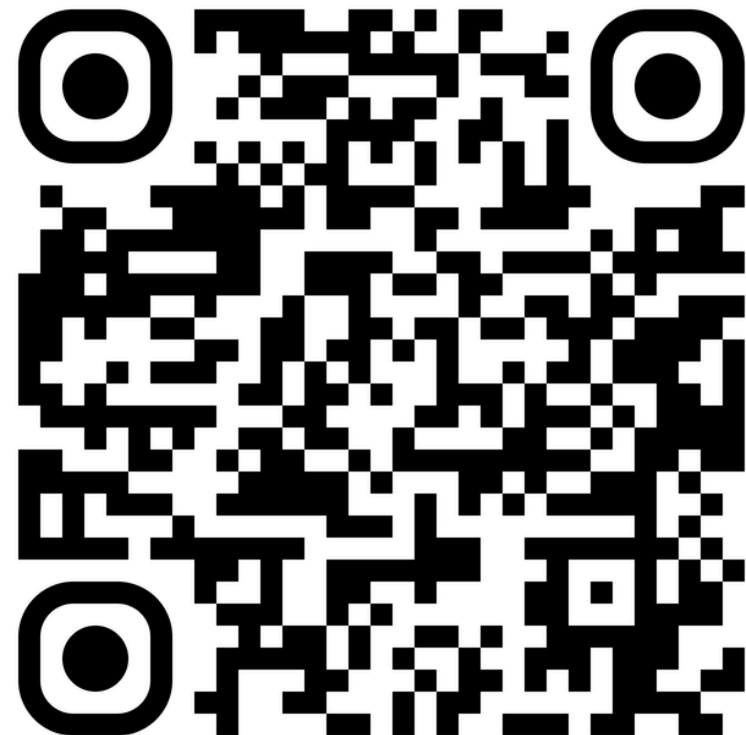
What brought you here today?

YOUR GOAL

What would success look like for you in today's session?

Raise your hand if any of these feel familiar. Circle the one that feels most true in your practice right now.

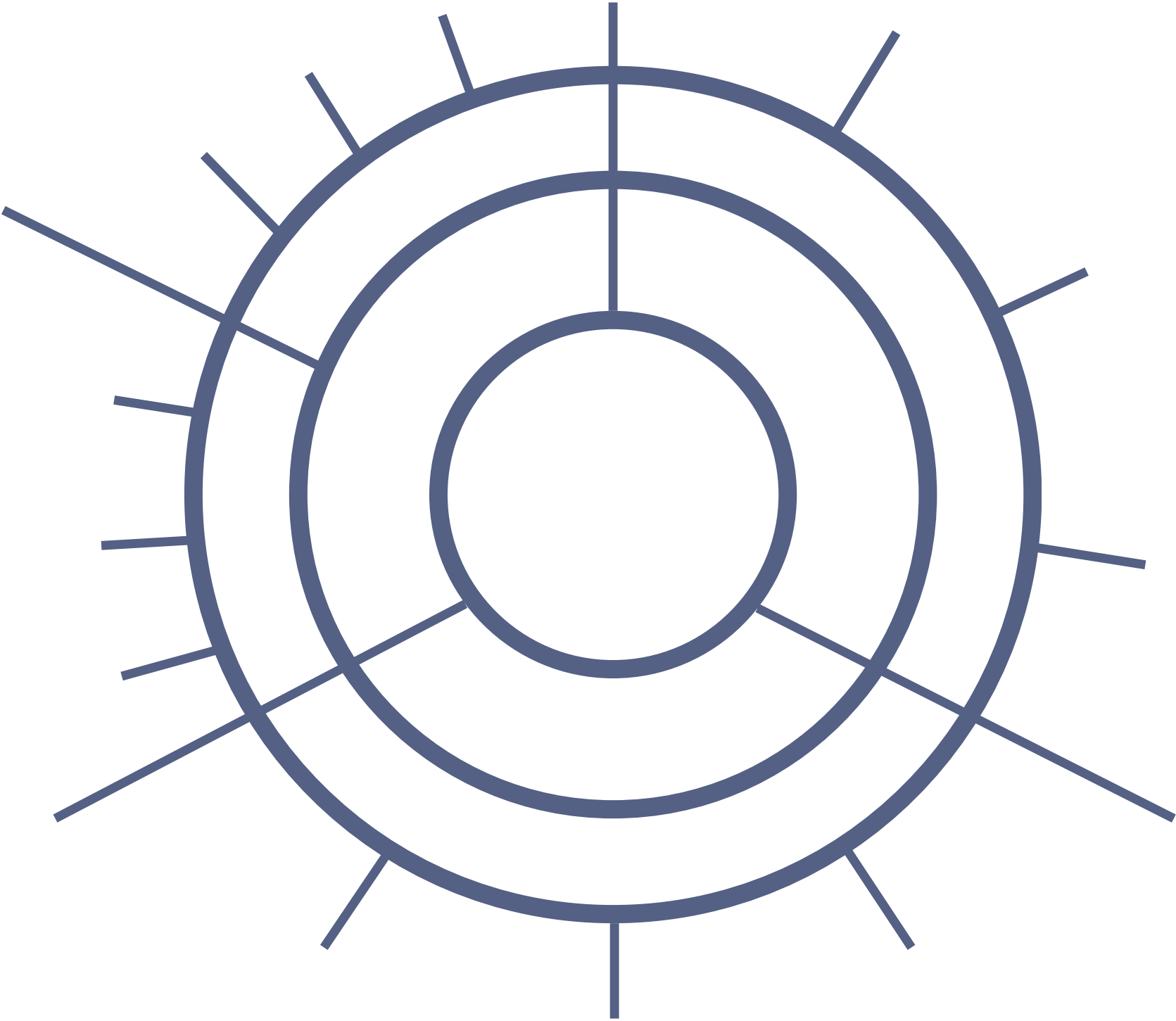
- ☐ I want more revenue — but I've hit a ceiling.
- ☐ I want more impact — but I'm not reaching the right clients.
- ☐ I want more freedom — but the business can't run without me.
- ☐ I can't take time off without things falling apart.
- ☐ I have no real systems — everything runs through me.



YOUR REFLECTION

"Which of these feels most true in your practice right now? Circle it. Then write one sentence about what it is costing you."

Your Roadmap for Today



Where Are You on the Climb?

TODAY

IN 24 MONTHS

THE GAP



RELENTLESS FOUNDATION

My Core Values

1

MY VALUE

2

MY VALUE

3

MY VALUE

4

MY VALUE

5

MY VALUE

Vision Drives Everything

MY ONE-SENTENCE VISION STATEMENT

ATTRACT	CONVERT
DELIVER	RETAIN

REFLECTION

Scoring the Delta

Review each slider. Rate your gap from 1 (small) to 9 (large). Then circle your top 3.

#	SLIDER NAME	GAP 1-9
1	Client Volume	☐
2	Niche Focus	☐
3	Client Wealth Level	☐
4	Service Depth	☐
5	Planning Focus	☐
6	Practice Scale	☐
7	Your Role	☐
8	North Star	☐
9	Long-Term Role	☐
10	Exit Vision	☐
11	New Client Intake	☐
12	Sales Process	☐
13	Sales Style	☐
14	Marketing Style	☐
15	Brand Presence	☐
16	Content Approach	☐
17	Team Size	☐

#	SLIDER NAME	GAP 1-9
18	Hiring Philosophy	☐
19	Culture Style	☐
20	Tech Stack	☐
21	Process Documentation	☐
22	Client Communication	☐
23	Service Delivery	☐
24	Meeting Frequency	☐
25	Onboarding	☐
26	Offboarding	☐
27	Compensation Model	☐
28	Fee Level	☐
29	Revenue Model	☐
30	Income Target	☐
31	Growth Ambition	☐
32	Compliance Overhead	☐
33	Risk Guardrails	☐
34	Contract Style	☐

VISION TOOL



Scan to take the digital version of this assessment

MY 3 HIGHEST-GAP SLIDERS

1. _____
2. _____
3. _____

You cannot build a system for someone you do not understand. Use this tool to start building your avatar profile right now. The full version is available exclusively inside the Relentless Value Coaching client portal.



SCAN TO ACCESS YOUR TOOL

DELIVER

Design Your Client Journey

1	STEP NAME	
2	STEP NAME	
3	STEP NAME	
4	STEP NAME	
5	STEP NAME	
6	STEP NAME	
7	STEP NAME	

CONVERT

1. **Identify the problem.** The first step in the problem-solving process is to identify the problem. This involves understanding the situation, gathering information, and determining the goal.
2. **Generate possible solutions.** Once the problem is identified, the next step is to generate possible solutions. This involves brainstorming ideas and considering different approaches.
3. **Evaluate the solutions.** After generating possible solutions, the next step is to evaluate them. This involves comparing the solutions against the goal and considering the pros and cons of each.
4. **Select the best solution.** Once the solutions have been evaluated, the next step is to select the best one. This involves choosing the solution that best meets the goal and is most feasible.
5. **Implement the solution.** After selecting the best solution, the next step is to implement it. This involves putting the solution into action and monitoring progress.
6. **Review the results.** Once the solution has been implemented, the next step is to review the results. This involves evaluating the outcome and determining if the goal has been achieved.
7. **Reflect on the process.** The final step in the problem-solving process is to reflect on the process. This involves thinking about what worked well and what could be improved for next time.

Figure 1. A schematic diagram of the experimental design. The first part of the experiment was a pretest to determine the appropriate number of trials for each condition. The second part was the main experiment, which was divided into two sessions. The first session was a pretest to determine the appropriate number of trials for each condition. The second session was the main experiment, which was divided into two sessions. The first session was a pretest to determine the appropriate number of trials for each condition. The second session was the main experiment, which was divided into two sessions.



Design Your Prelude Sequence

7

11

4

THE 7-11-4 RULE

The Meeting Structure

STAGE 1 Opening	STAGE 2 Discovery	STAGE 3 Prescription	STAGE 4 Close

THE COMMITMENT QUESTION:

My No-Maybe System

Yes	No	Not Yet

PART 4 | CONVERT

Convert

PHASE ASSESSMENT



SCAN TO TAKE THE ASSESSMENT

ABSTRACT

My 1+1+1 Strategy

1 + 1 + 1 = \$1M

AVATAR

PROBLEM

OFFER

Design Your Core Offer

1 PAIN

2 PROBLEM

3 PATH

4 PROOF

5 PAYOFF

My Attraction Strategy

THE SHIFT

OLD WAY	NEW WAY

MY BIGGEST SHIFT

3 Primary Objectives



MY TOP 3 GAPS		THE SPECIFIC FIX — ONE ACTION, STATED PRECISELY	DONE BY (EXACT DATE)
1			DONE BY
2			DONE BY
3			DONE BY

RELENTLESS VALUE COACHING

Ready to Build Your Relentless Practice?

APPLICATIONS NOW OPEN

This is not a course. This is not a mastermind. This is a structured coaching engagement built for the advisor who is serious about building a practice worth owning and a life worth living.

- Personalized roadmap built around your avatar, your offer, and your vision
- Proven frameworks across all four phases of the client journey
- Direct access to Justin and the Relentless Value Coaching team
- Built for advisors who want more money, more freedom, and more impact

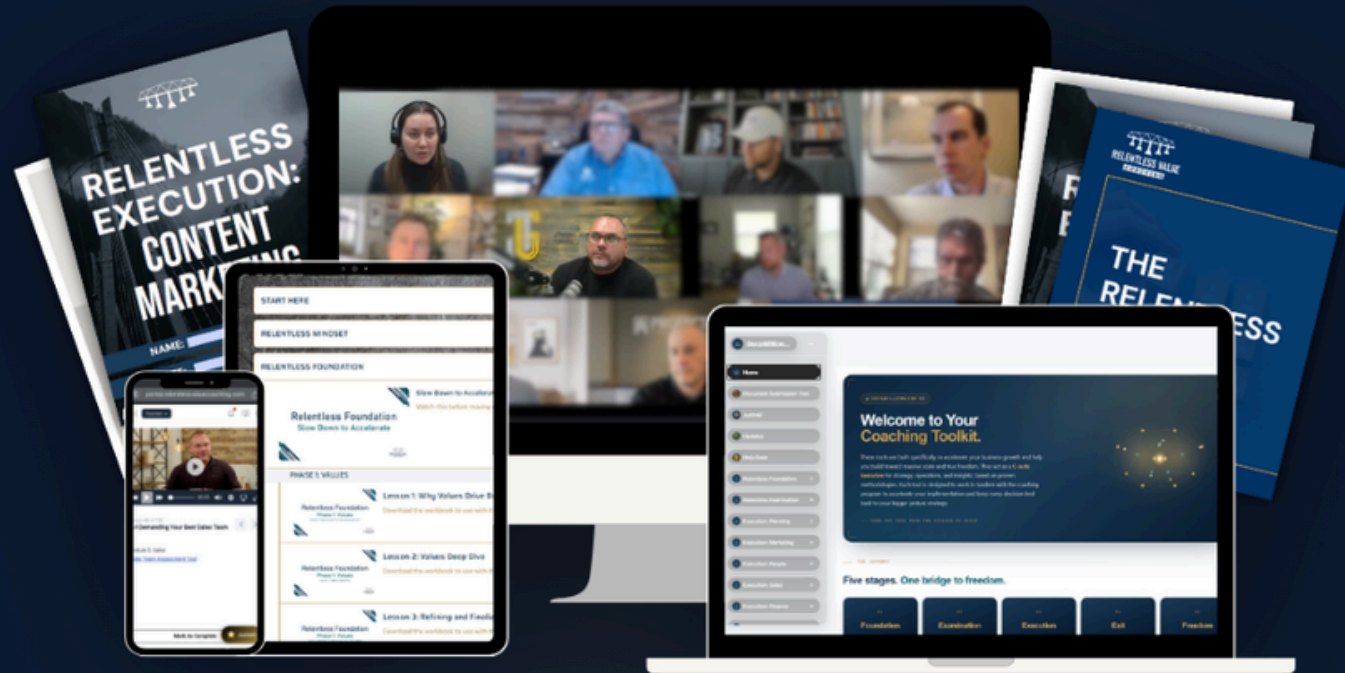
Spots are limited.

Apply today to see if you qualify.



"Scan to submit your application. A member of the Relentless Value Coaching team will reach out within 48 hours."

APPLY NOW



AI TOOLKIT

COACHING CALLS

MOBILE APP

RELENTLESS VALUE COACHING

Everything You Need. In One Place.

Built for advisors who are serious about building a practice that works without them. Over 14 months. With a team behind you every step of the way.



AI COACHING TOOLKIT

Purpose-built AI tools for avatar research, offer refinement, content creation, and client journey mapping. Not generic AI. Built specifically for your practice.



COACHING CALLS

Bi-weekly 1-on-1 coaching calls plus group calls with Justin and the RVC team. Real implementation, real accountability, real results – not just strategy conversations.



MOBILE APP ACCESS

Full access to your course library, workbooks, AI tools, and coaching resources from anywhere. Your entire practice-building system fits in your pocket.

MOST POPULAR

MILLION DOLLAR ADVISOR

\$360K to \$1M Revenue

Break through the \$1M barrier. Build a practice that runs like an asset, not a job.

CLUB DECAMILLIONAIRE

\$1M to \$3M Revenue

Scale to \$3M and beyond. Build the systems that give you your time back and position for an eight-figure valuation.

BILLIONAIRE BOARDROOM

\$3M+ Revenue

Invitation only. Peer-level access to advisors who have already been where you want to go.



Ready to Build the Practice You Actually Designed?

This is not a sales call. It is a strategy conversation. We will look at your practice, identify your highest-leverage gap, and tell you honestly whether we are the right fit.

APPLY TO WORK WITH JUSTIN



DecaMillionaire

DECODED

WITH

Justin Goodbread

NOW STREAMING

DecaMillionaire

DECODED

No fluff. No theory. Just real conversations with real business owners doing real numbers. Hosted by entrepreneur and exit strategist Justin Goodbread, each episode walks you through the Relentless Framework: Foundation, Examination, Execution, Exit, and Freedom.



Listen on Apple Podcasts



Watch on YouTube



Listen on Spotify



Scan to Listen Now

Point your phone camera at the code to access all episodes at justingoodbread.com/podcast

