Justin M Henegar Ph.D., CFA, CFP®, CKA®

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Wealth Management Executive

Track record of transforming financial planning education, spearheading innovative wealth management strategies, driving growth in assets under management, and integrating values-based approaches to financial decision-making.

Versatile leader known for developing financial planning processes, managing multi-million-dollar investment portfolios, and leading high-performance teams across academic and corporate settings. Experienced in creating and implementing insightful curricula for financial planning programs to accelerate enrollment rates and improve student outcomes. Adept at conducting impactful research, fostering strategic partnerships, and translating complex financial concepts into actionable insights for diverse audiences. Known for leveraging a unique combination of academic expertise and practical experience to drive innovation in wealth management practices, enhance client engagement, and improve portfolio performance.

Areas of Expertise

- Financial Planning & Analysis (FP&A)
- Tax-efficient Investment Strategies
- Investment Portfolio Management
- Asset Allocation & Rebalancing
- Client Relationship Management
- Financial Program Development
- Wealth Management Strategies
- Risk Assessment & Mitigation
- Team Leadership & Training
- High-level Decision-making
- Financial Literacy Initiatives
- Research & Analysis

Professional Experience

Professor of Practice, Financial Planning | Kansas State University – Remote **2022 – Present**

Develop and implement a tailored curriculum covering key aspects of financial planning, including Insurance Planning, Practice Management, Investments, and Estate Planning for undergraduate and graduate students. Execute administrative responsibilities within the Department of Financial Planning, including actively participating on graduate committee and college scholarship committee to improve educational offerings and expand student opportunities.

- Evaluated program effectiveness and growth as part of the Graduate Committee.
- Achieved an 8% Compound Annual Growth Rate (CAGR) in graduate enrollment despite overall declines.
- Enhanced various courses to boost student survey ratings, resulting in a 30% increase in student scores.

Managing Director | 724 Asset Management – Remote **2022 – Present**

Direct strategic and operational management of portfolio construction models for 724 Capital, an RIA firm, with a focus on enhancing investment strategies for varied client base. Collaborate with Private Equity partners to optimize investment placements and rebalancing strategies, aligning with client objectives and adapting to evolving market conditions.

- Leveraged strong people management skills to lead a dedicated team in managing multi-asset investment portfolios, offering comprehensive financial advice and customized investment solutions to advisors across the country.
- Directed critical reviews of cases for request for proposals (RFPs) with responsibilities to address issues and present findings and recommendations to prospective clients.
  - Achieved successful client acquisition and increased advisors' Assets Under Management (AUM) by nearly 50%.

Assistant Professor of Finance | Taylor University **2019 – 2022**

Designed and delivered a diverse array of finance courses including Personal Finance, Investments, Real Estate Finance, and Equity Analysis, integrating practical skills with theoretical understanding. Served as Faculty Director, enhancing student engagement and learning outcomes via direct involvement in real-world financial management and investment analysis.

- Led Student Managed Investment Fund (SMIF), including managing approximately $5.5M across domestic equity, international equity, and income portfolios.
- Established and maintained a partnership with Financial Counseling and Planning Association to facilitate students in obtaining the Accredited Financial Counselor (AFC) designation.
- Conceptualized and gained approval for Certified Financial Planner™ (CFP®) program.
- Crafted the CFP® approved program. Formulated and secured approval as a CFA Partner university.
- Cultivated a partnership with Kingdom Advisors to provide the CKA Educational Program.
- Designed 16 new courses in financial planning and financial analysis.
- Partnered with professional organizations to develop pathways for 4 professional designations (CFA, CFP, AFC, and CKA).
- Accomplished a 30% increase in enrollment in finance department within two years.

Executive Director of Research & Scholarship, Ron Blue Institute for Financial Planning, IWU **2015 – 2019**

Directed institute's key efforts to secure national recognition for integrating Biblical financial principles across personal, corporate, and social contexts. Developed educational products and services for a diverse audience, including colleges, churches, and businesses, to promote biblically integrated financial planning.

- Steered development and implementation of research projects to connect theoretical financial concepts with practical applications, greatly enhancing institute's academic and practical influence.
- Authored and published a college textbook within nine months, complete with 1K+ test bank questions, 19 chapter-specific PowerPoint slides, and 19 supplemental case studies, enriching educational resources in financial planning.
- Established a peer-to-peer mentor program now active in five universities nationwide, aiding thousands of students in developing effective budgeting and sound money management skills.

Financial Advisor, Financial Planner | Merrill Lynch, Bank of America **2014 – 2015**

Improved portfolio performance and client satisfaction via expert financial planning and investment advice.

- Streamlined operations and strategic planning for a nine-member financial advisor team managing $500M in assets.
- Boosted client engagement, data accuracy, and overall client experience by developing and implementing a unique, four-phase financial planning process.

Client Relationship Manager **2009 – 2014**

Created and implemented coaching and development programs for financial advisors, enhancing operational efficiency and client service quality across complex. Showcased excellent teamwork and interpersonal skills to liaise with senior management to devise and enact strategic initiatives that significantly improved client retention and attraction rates.

- Directed client relationship management for Lone Star complex, managing $16B in assets under advisement of more than 184 financial advisors, both domestic and international.
- Boosted client service quality by 45% through regular team accountability meetings.
- Led complex to win Service Quality Award twice, an honor bestowed upon complex with highest service quality scores.
- Conducted over 150 team meetings with advisors and associates focused on improving client experience, leading to more efficient portfolio management, reduced client complaints, and increased team efficiency.
    - Accomplished an average asset growth of 15-20% in following year.

Education

Doctor of Philosophy (Ph.D) in Personal Financial Planning | Kansas State University (2014)

- ***Dissertation:*** *Homeschooling and Financial Literacy: A Qualitative Study*

Master of Science in Finance | Texas A&M University-Commerce (2017)

Master of Business Administration (MBA) in Leadership and Organizational Development | Oklahoma Christian University

Bachelor of Arts in Liberal Studies | University of Oklahoma

Certifications

CFA Charterholder (CFA) (2024) | **Certified Kingdom Advisor** (CKA) (2013) | **Certified Financial Planner™** (CFP®)

Volunteer Experience

Strategic Advisor | SeekInvest

- Guided strategic development of values-oriented investment strategies.
- Collaborated with CEO on holistic client engagement methods in values-oriented portfolio management.

Board Member | Fishers Area Swimming Tigers

- Contributed to governance and strategic planning to enhance community swimming programs and athlete development.

Founder and Monthly Host | San Antonio Christian Financial Professionals Network **2014 – 2015**

- Initiated and led a network for Christian financial professionals, fostering integration of biblical principles in finance.
- Coordinated monthly sessions featuring speakers on biblically based finance topics.

AWANA Sparks Leader

- Mentored first-grade boys, facilitating weekly scripture learning and discipleship activities.

Money Talk Host

- Hosted monthly forums for students, discussing financial and entrepreneurial ideas to boost financial literacy.