



Joel Lund

Joel Lund is an independent Consultant with NAVIX exit planning network.

“As a strategic advisor, I help successful business owners prepare for their eventual exit, so they achieve the financial freedom they’ve dreamt about during the hard years and exit on their terms. In addition to helping business owners navigate a successful transition beyond their business, I am the trusted advisor’s trusted advisor, often the allied professionals who are accustomed to working with owners when they are growing their business. I help these financial professionals thrive, so they can magnificently fulfill their mission of helping others make their financial dreams come true.

So, investment and insurance professionals depend on me to help them grow an exceptional practice that delivers the best that their clients need. And their business clients depend on me to prepare them—and their business—for the exit they’ve worked so hard for.”

Joel Lund has worked 20+ years with financial professionals, from advisors and agents to investment brokers, RIAs, financial planners, CPAs, and law firms. As a Managing Principal with WADDELL & REED through the worst of the Great Recession, he received the International Management Award from GAMA four times.

Joel holds three executive coaching certifications, with specializations in optimizing teams for revenue acceleration, and quickly advancing performance from those in executive leadership. His mastermind groups help members to quickly and easily make career-empowering leaps.

Prior to his work in the private sector, Joel worked in the non-profit arena and especially enjoyed working with church leaders and organizations serving the disenfranchised. He is an award-winning author of four books, in both fiction and non-fiction. An engaging speaker, he’s shared with Chambers, company teams, leadership groups, non-profits, schools, and firms in many states and western Canada. By bringing a right/left brain holistic viewpoint together for his audience, they’re encouraged and finally able to see a clear path to the goals that had eluded them.

Joel has completed the STP Bicycle Classic (a 200-mile, two-day ride from Seattle to Portland) several times, including twice with his wife on their tandem). He’s also scaled many routes in Joshua Tree (up to 5.11) and other great rock-climbing locations in California (establishing and naming a climb near Monterey) and all over Washington state.