

# Community - “For Us, By Us”

*What it really means, and why it matters*

## WHAT IT REALLY MEANS

**Ownership stays close to the work. Decisions are made by people who understand the context. Value flows back to those who create it. And the community exists to serve its members, not extract from them.**

"For us, by us" can sound like a slogan. For us, it means something very specific and it shapes almost every decision we make. Broadleaf wasn't designed by people looking at the industry from the outside. It was built by people who have run advice businesses, carried client responsibility, and thought deeply about succession and ownership.

We didn't set out to build a platform for advisers. We built something with them, because we are them.

### Starts with lived experience

Built by people who have run advice businesses, carried client responsibility, and faced the real challenges of succession and ownership.

### Ownership makes it real

Community without ownership is fragile. Shared equity turns community from a concept into a genuine commitment.

### Independence, together

Partner businesses stay distinct - different styles, different brands. What connects them is alignment: shared values, standards, and long-term intent.

### Learning travels sideways

Knowledge flows peer-to-peer, not top-down. More trusted, more practical, and it sticks - because it comes from people who have been there.

## Support vs Community

Support	Community
– Transactional - switched on and off	– Relational - compounds over time
– Provides answers	– Shares context and lived experience
– Defined by the provider	– Built by its members
– Fades when not actively used	– Carries memory and grows stronger
– No shared memory or context	– Trust deepens through shared history

## A Quieter Kind of Accountability

Community creates a subtle but powerful form of accountability - not compliance, not enforcement. Just the knowledge that:

- Your decisions affect others
- Your behaviour reflects on the group
- You're part of something bigger than your own business

That kind of accountability raises standards without heavy-handed control.

## Why This Matters in Financial Planning

Financial planning is deeply personal. Advisers carry emotional and ethical weight that doesn't show up on balance sheets. A strong community provides:

- Perspective when things are heavy
- Support when decisions are difficult
- Confidence when the path isn't clear

Isolation is one of the quiet risks of owner-led businesses. Community reduces that risk.

*"Community can't be rushed. It's built through consistent behaviour, fairness over time, shared experience, and mutual respect. That's why we're careful about who joins. Every new business changes the shape of the community and we treat that responsibility seriously."*