

# Our Vision Explained

*What we mean, and what it looks like at maturity*

## OUR VISION

**To be the highest-quality community of employee-owned Financial Advice businesses. Be a standard bearer for service, capital stewardship and culture in Australia. Enable all Australian families access to quality advice.**

Below is what we mean by each part of it, and what it looks like when we get there.

### The Highest-Quality Community

We are not building the largest network. We are building the highest-quality community. Quality, for us, is behavioural. We seek owner-leaders who are:

- Humble enough to know there is more to learn
- Hungry enough to want to improve
- Smart - commercially and emotionally
- Curious by habit
- Practitioners of continuous improvement

The power is not in scale alone. It is in alignment at scale.

### A Standard Bearer for Service

Our BHAG is to be Australia's best service business. In professional services, technical excellence is expected. Hospitality is differentiating. Borrowing from Danny Meyer:

- Service is what you do
- Hospitality is how people feel

To be a standard bearer means others look to your behaviour as an example. Quietly. Consistently.

### Employee-Owned Businesses

We believe financial planning businesses should be majority owned by the people who work in them every day, the advisers, the leaders, the next generation. Not distant capital. Not short-term investors. When the people serving clients own the business:

- Incentives align naturally
- Decisions stretch decades forward
- Culture becomes a strategic asset
- Client relationships are treated as legacies

We invest as minority partners by philosophical design, not structural accident.

### Capital Stewardship

The businesses we partner with are responsible for the life savings of thousands of Australian families. That is a moral obligation, not a line item. Stewardship means:

- Discipline in investment decisions
- Transparency in fees
- Governance that protects clients
- Long-term thinking in ownership

Stewardship is quiet. It is not flashy. It is durable.

“Quality → Trust → Growth → Cash Flow → Reinvestment → More Quality. When quality is curated and aligned, it compounds. This is not a roll-up. It is a compounding ecosystem.”

### What the Business Looks Like at Maturity

Serving, not controlling, 40 to 50 high-quality financial planning businesses across Australia, each majority owned by the people who work within it. Broadleaf, holding on average a 25% stake, is a focused minority partner in a deliberately curated ecosystem.

### A Small Giant

The goal is not to become a multi-billion-dollar empire. The goal is to become a small giant, a business spoken about in the same context as the great long-term compounding companies of the world. Not because of its size, but because of its discipline, stewardship, culture, and staying power.

### A Vision Worth Growing Into

This Vision is not something we declare achieved. It is something we grow into, deliberately and patiently. By remaining faithful to employee ownership, hospitality-driven service, capital stewardship, and quality over speed, the numbers will follow. More importantly, Australian families will be better served.