

Why Our Focus Is Financial Planning

And why saying “no” is part of building something great

THE CORE POSITION

Focus isn't about what's possible. It's about what deserves your full attention. Broadleaf is being built to do one thing exceptionally well and that requires the discipline to say no, repeatedly.

People often tell us the Broadleaf model would work in lots of industries - accounting, legal, medical, engineering, consulting. They're right. The model would work. Anywhere value is carried by people, trust, and long-term relationships, the principles apply. But focus isn't about what's possible. It's about what deserves your full attention. And execution is something else entirely.

The Distinction That Matters

The Model Travels	Execution Doesn't
– Ownership staying with the people who do the work	– Lived experience inside financial planning businesses
– Long-term succession thinking	– Deep understanding of advice business dynamics
– Minority partnership, not control	– Long-standing relationships with owner-leaders
– Wide shareholder bases	– Genuine appreciation for the responsibility advisers carry
– Patience, alignment, and stewardship	– The ability to see around corners - not from theory, but experience

Focus is a form of respect

Choosing depth over breadth is a form of respect for the industry and the people in it. We don't dilute our attention or pretend to know things we don't.

Distraction is the real risk

Trying to build multiple things at once leads to shallow expertise, competing priorities, cultural drift, and reduced service quality.

Staying in our lane

We know financial planning. We've lived it. That depth lets us ask better questions, see around corners, and act with credibility rather than theory.

The Model Can Still Travel

This doesn't mean Broadleaf's philosophy and structures could never be applied elsewhere. If the right person or group wanted to:

- Lead a similar business in another vertical
- Apply the Broadleaf philosophy and structures
- Build something genuinely high quality
- Create a true win/win arrangement

We'd happily have that conversation. The condition is simple - someone else must own the focus and the execution. Because focus can't be delegated.

A Long-Term Bet on Quality

If, years from now, Broadleaf is known as:

- A small but exceptional community
- A trusted partner to financial planning businesses
- A quiet force for better ownership and succession outcomes

That will be more than enough. We don't need to be everywhere. We need to be useful — deeply, consistently, and over the long term.

"There's a quiet discipline in choosing not to expand just because you can. In choosing depth over breadth. Mastery over novelty. Service over scale. Broadleaf is not being built to touch every industry. It's being built to do one thing exceptionally well."