

A Million Lives

Why Broadleaf became the vessel and not the goal

THE PERSONAL BIG HAIRY AUDACIOUS GOAL (BHAG)

To have a material positive impact on a million lives.

Not for applause. Not for a headline. As a forcing function. A number big enough that it requires structure, discipline, and building something bigger than yourself.

There was a period where, from the outside, everything looked fine. Progress was good. Nothing was broken. But internally, there was persistent dissatisfaction. That dissatisfaction forced harder questions. What does success actually mean? Why build something? If you strip away money and status, what's left? The more honest the answers became, the clearer it was: what mattered was impact. Not vague. Not ego-driven. Meaningful, measurable, human impact.

The Four Anchors of My Best Self

01

Great Service

Service is the orientation that makes everything else meaningful.

02

Family Focus

The foundation that everything else is built around.

03

Learning Machine

Curiosity as a discipline, not just an inclination.

04

Physical Fitness

The daily practice that reinforces every other commitment.

The Maths of a Million

100,000

families receiving quality financial advice

× 10

lives meaningfully impacted per family served

1,000,000

lives materially and positively impacted

Impact Compounds Quietly

Impact doesn't only happen at scale. It happens in daily interactions. Every thoughtful conversation, every clear succession plan, every next-generation leader brought into ownership, every business strengthened for the long term.

Broadleaf isn't a machine for transactions. It's a structure that enables thousands of small acts of service to compound over decades.

- Each family supported compounds
- Each business strengthened compounds
- Each next-gen leader in ownership compounds

That's how a million lives are reached.

The Mindset Behind It

This mindset changes how we show up. The question isn't "How do we maximise this deal?" It's "How do we maximise the long-term positive effect?"

A subtle shift. But it changes every decision.

- Invest in people, not just transactions
- Invest in structure that enables longevity
- Invest in durability, because impact requires it

If you build something that meaningfully improves people's lives, with integrity, for long enough, the economics take care of themselves. They compound. Just like impact does.

"Broadleaf is the vessel. The mission is impact. One million lives is simply the discipline that keeps us honest. To look back decades from now and know: we built something that mattered, it improved lives, and it outlasted us."

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