

“Aren’t You Going to Tell Us What To Do?”

Why we don’t fold businesses into “our way” of working

“If we partner with you, are you going to tell us what to do?” “Will we end up being folded into your model?” These are critical questions. If someone didn’t ask them, we’d be more worried.

The financial advice industry has given people plenty of reasons to be cautious. For many owners, partnering with a larger group has historically meant loss of autonomy, standardised systems, centralised decision-making, and a gradual erosion of what made the business special. We’ve seen this happen first-hand. We understand why people are sceptical.

THE SHORT ANSWER

No. Broadleaf was never designed to be a single operating model. We don’t believe there is one “right” way to run a high-quality advice business. We don’t arrive with a playbook and a mandate. Our job is to help businesses become more themselves - not less.

Help, But Don’t Interfere

Support, don’t override

We offer frameworks, not instructions. We challenge thinking, not identity. Our role is to support leadership, not replace it.

Influence is earned

As a minority owner, influence can’t be forced. It must be built on trust, context, and relevance to that specific business, not assumed.

Involvement is shaped by need

Sometimes active. Sometimes a sounding board. Sometimes simply present. The level of involvement follows what the business needs, not a template.

Restraint is the discipline

Stepping in disempowers owner-leaders and creates dependency. We actively resist the temptation. Stronger, clearer, more durable, that’s the goal.

What Partnering With Broadleaf Actually Means

What Does Change	What Doesn’t Change
– Clearer ownership agreements and governance	– Decision rights - they stay with you
– More deliberate succession thinking	– Brand, culture, and client relationships
– Better role clarity at leadership level	– How you run your business day to day
– Access to shared experience, peer learning, and resources	– What makes your business distinctively yours

Why Independence Matters to Us

Independence isn’t just a talking point. It’s core to why high-quality advice businesses exist and why clients trust them. Local decision-making, deep client relationships, and professional judgment.

Centralising those things in the name of efficiency often destroys the very value that was being invested in. We’re not interested in that trade-off.

We invest because we believe the business is already high quality. If we felt it needed to be fundamentally remade, we wouldn’t partner in the first place.

Why This Works Long Term

Businesses that retain autonomy tend to:

- Keep their best people
- Serve clients better
- Adapt faster to change
- Outlast those built on imposed uniformity

We don’t need to be in the spotlight. We don’t need to be in charge. We need the businesses we partner with to thrive in their own way. Our role is to walk alongside, ask better questions, share what we’ve learned and get out of the way when that’s what’s needed.

“If we ever needed to tell people what to do for the model to work, we’d consider that a failure of design. Our job is to help businesses become more themselves - stronger, clearer, and more durable. Not to override the very thing that made them worth investing in.”