

Who Are We Looking to Partner With?

And why fit matters more than scale

Not every business is right for Broadleaf. And Broadleaf isn't right for every business. We say that openly, pretending otherwise helps no one. Partnership only works when there's genuine alignment, not just on numbers, but on intent, values, and how people want to build something over time.

We're not looking for flawless businesses with everything worked out. We can help with structure, clarity, and support. We can't help with integrity.

WHAT WE LOOK FOR

Great businesses run by great people who don't need to be perfect, but want to build something that lasts. Businesses that are fundamentally sound, ethically grounded, open to reflection, and serious about their future.

The People We Partner With

1

Owner-Leaders

People who care deeply about clients, feel responsibility for their team, and want the business to outlast them not "cash it out".

2

Curious, Not Certain

Curiosity signals humility and humility is essential in long-term partnerships. We're wary of certainty. It usually leaves no room for learning.

3

Ownership Mindset

Open to broader ownership over time, willing to create pathways for the next generation, and clear that ownership means responsibility as much as reward.

4

Long Time Horizon

Not looking for a fast exit or quick arbitrage. Comfortable playing a longer game, valuing optionality over urgency, and building steadily.

The Businesses We Partner With

At the business level, we're drawn to financial planning firms with a strong client base built on genuine relationships, a clear advice-led service ethos, and a history of profitability earned through care, not shortcuts.

- Built over many years - survived regulatory change
- Earned trust and reputation the hard way
- Reputation they care deeply about protecting

Reputation is fragile. And it compounds, just like value does.

Why Being Selective Matters

It would be easier to grow faster by lowering the bar. But quality erodes quickly when selection becomes reactive.

By staying selective:

- We protect the culture of the community
- We protect existing partners
- We protect our own focus and energy
- We increase the odds of long-term success

That's not elitism. That's stewardship.

Partnership is a two-way decision. We encourage people to speak to other Broadleaf partners, test assumptions, ask hard questions, and take their time. If it's right, it won't need to be rushed.

"People matter more than spreadsheets. Numbers tell us what has happened, not who people are. We spend a lot of time understanding how decisions are really made, how conflict is handled, and whether there's trust beneath the surface. Over time, it's people that determine whether a partnership works."

Who Are We Looking to Partner With?

The profile we look for when evaluating a partner business opportunity

Typical Hub Business

<p>1 3 to 7 Advisers</p>	<p>2 Financial Planning Focus</p>	<p>3 Preference for Capital City Location</p>	<p>4 Quality People and Service Offering</p>	<p>5 Long Operating History – 10 Years+</p>
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Partner Business Filter

How we assess fit across business profile, owner type, and financials

