

# The 8 Shifts of a Purpose-Focused Advisor

Cut through the noise. Lead with clarity.  
Build a business—and life—aligned with  
what matters most.

**TRUEST FAN  
COACHING**  
BY ROB BROWN



# Purpose-Focused

Most advisors get into this business for good reasons. They want to help people. They want freedom. They want to build something meaningful. But somewhere along the way, it's easy to get caught in the noise—industry pressure, endless demands, and success that checks the boxes but leaves you wondering, "Is this really it?"

That's where these eight shifts come in.

They're not tactics or quick fixes. They're transformations—small but powerful changes in how you think, lead, and show up. When you begin to shift in these ways, your business becomes more than efficient. It becomes aligned. And your life begins to reflect something deeper.

For me, that "something deeper" is purpose. And my simple definition of purpose is this:

**Leading the life God created you to live—and being intentional about it.**

That's the heart behind this guide. I don't share that to push my faith on you. But I always welcome conversations about my faith, and I love helping others understand what I believe—because it's changed everything about how I live, love, and lead.

You don't need to master all of these today.

But you do need to start.

Because purpose isn't something you find. It's something you live.

Whether or not you share that belief, I invite you to walk through these eight shifts with fresh eyes.

Each one includes a short reflection and a simple action—so you can begin to notice where you are now, where you want to go, and what might be holding you back.

Let's get started.

**—Rob Brown**

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Host, *The Purpose-Focused Advisor Podcast*

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Author, *Delivering the Ultimate Client Experience*

Author, *The Truest Fan Blueprint: Focus on What Matters to Achieve Your Most Cherished Goals*  
(coming August 2025)



## How to Use This Guide

*Put the shifts into practice—not just in theory.*



### Read with Curiosity

Each shift includes a mindset change, a simple practice, and a real advisor story. Don't just read—reflect, asking:

- “Where am I already doing this?”
- “Where am I stuck?”
- “What’s one thing I could try?”



### Use It as a Weekly Practice

Pick one shift each week. Block time to journal, talk it over with a colleague, or bring it into a team meeting.



### Want to Go Deeper?

Schedule a Purpose-Focused Scorecard Session with me to identify your next step:

[truestfan.com/scorecard-session](https://truestfan.com/scorecard-session)

# Foundation

Reclaim your time, focus, and goals by aligning your business with your purpose.







# Shift 1: From Pressure to Perform → to Freedom to Serve

## What This Means:

Traditional success keeps advisors chasing: more AUM, more appointments, more checkboxes. The Purpose-Focused Advisor stops measuring the day by hustle and output—and starts evaluating success based on alignment with purpose and service to others.

## Why It Matters:

When performance defines your value, your business runs you. But when you lead from purpose, you regain control of your calendar, your mindset, and your impact. Even the mundane has meaning.

## Purpose in Practice:

Two partners I coach originally hired me to help them create a succession plan. They were focused on mechanics: valuation, timelines, legal structure. But the more we talked, the more it became clear—they hadn't paused to ask *why* they were planning succession in the first place.

As we unpacked their purpose, a theme emerged: they weren't just running a firm—they were serving families across generations. That insight shifted everything. Their plan stopped being about retirement logistics and started becoming a message to their clients:

**“We’re here for your family—not just now, but for generations.”**

Their succession plan became an extension of their mission, not just a financial transaction.

### 🕒 Try This: The 3-Minute Alignment Log

At the end of each day, jot down:

1. One activity that aligned with your bigger purpose
2. One activity that pulled you off-course or distracted you

Do this for 5 days. Patterns will surface.

## Anchor Statement:

Every day can be a great day—when it reflects who and what you're really serving.



## Shift 2: From Reactive Busyness → to Focused Intentionality

### What This Means:

Most advisors are pulled in too many directions. The Purpose-Focused Advisor breaks that cycle by building rhythms that prioritize what matters—not just what's urgent.

### Why It Matters:

Busyness leaves you scattered. Focused intentionality helps you lead with confidence, clarity, and consistency.

### Purpose in Practice:

One advisor I work with had unusually high turnover. His team loved serving clients—but they couldn't keep up with him. The pace was chaotic, with constant pivots to whatever felt most urgent in the moment. That pressure drained energy and trust.

When he finally paused to define his purpose, he realized the real problem: *he was setting the wrong tempo*. Together, we created a simple system for daily huddles that aligned the team around what mattered most that day.

The results? The team slowed down, gained clarity, and found consistency. Turnover stopped—and the business kept growing.

### ✔ Try This: Start with Your 1-Hour Window

Pick a one-hour window each morning to focus on work that supports your purpose—before checking email or jumping into the day's chaos. Block it. Name it. Protect it.

### Anchor Statement:

Don't let urgency steal what matters most. Own your attention, lead with intention.

## Shift 3: From Scattered Goals → to Purpose-Aligned Growth

### What This Means:

Too many goals lead to too little focus. The Purpose-Focused Advisor simplifies the scoreboard by aligning business goals with personal convictions.

### Why It Matters:

Scattered goals lead to scattered energy. When growth is tied to what truly matters, progress becomes more consistent and more satisfying.

### Purpose in Practice:

I worked with an advisor who had a knack for serving a specific niche—but didn't see it. His book was growing, but he was constantly chasing new types of clients and new strategies, thinking growth would come from broader outreach.

When we stepped back to analyze who he was serving best—and enjoying most—it was clear: the niche was already there. We just had to name it and align the business around it.

Once he focused on that audience, the momentum was extraordinary. He grew from \$25M in AUM to over \$100M in just a few years—all by serving the right people with the right purpose.

#### ☑ Try This: Your Purpose Filter

Look at your current list of goals. For each one, ask: "Is this helping me build the business—and life—I'm really meant to lead?" Circle the clear yeses. Star the ones to pause, delegate, or rethink.

#### Anchor Statement:

Growth feels better—and works better—when it reflects who you really are.

A lighthouse with a glowing light at the top, set against a blue sky with white clouds. The lighthouse is white with a red roof and a red flag on top. The light is bright yellow and orange, creating a warm glow. The sky is a clear blue with soft white clouds. The lighthouse is positioned in the center of the frame, with the text overlaid on the left side.

# **Identity & Leadership**

**Let go of comparison, define success on your terms, and lead with trust.**



## Shift 4: From Comparison → to Conviction

### What This Means:

It's easy to measure success against others. The Purpose-Focused Advisor steps off the comparison treadmill and builds from personal conviction.

### Why It Matters:

Comparison creates self-doubt. Conviction creates clarity. When you lead from who you are, not who you're not, your voice gets stronger.

### Purpose in Practice:

I coached an advisor who felt stuck at \$100M AUM. He was making a great living, but constant comparison to other firms left him feeling behind. He'd scroll websites, chase rankings, and walk away from conferences convinced he was doing it wrong—even though his clients loved him.

The turning point came when we stopped chasing “what they're doing” and focused instead on what *he* wanted to build. With clarity around his purpose and vision, he committed to growing his firm with intention—adding three younger advisors whom he could coach and develop. Over time, the firm grew steadily, and when he eventually sold the business to those advisors, they had grown to \$650M in AUM. He remained the largest owner until that transition.

Comparison didn't get him there. Purpose did.

#### ✓ Try This: Clarify Your Convictions

Set a 10-minute timer and answer: "Here's what I believe great advisors do—and here's how I want to show up differently because of that." Read it out loud. Then lead from it.

### Anchor Statement:

The market doesn't need another version of someone else. It needs a clearer version of you.

## Shift 5: From Surface Success → to Meaningful Impact

### What This Means:

Success that looks good on paper can still feel hollow. The Purpose-Focused Advisor redefines success by the impact they make in the lives of others.

### Why It Matters:

Meaning creates momentum. When your work reflects who you are and why you care, everything changes.

### Purpose in Practice:

I worked with an advisor who had a thriving business and a big team. He always valued giving back to his community, but his involvement was scattered—a donation here, some volunteering there—more out of obligation than focus.

One day, we had a deeper conversation about what he truly wanted his stewardship to accomplish. That led to a major shift. Instead of spreading himself thin, he focused his energy on just a couple of causes that meant the most to him. He didn't just give money—he gave attention, leadership, and service.

Over time, his view of success evolved. It wasn't just about making and giving money—it was about showing up with purpose. As he gave his best to each cause, he left a lasting impact and moved on to help others do the same. His legacy wasn't just financial—it was transformational.

#### 👍 Try This: Define What Meaningful Means

Think of a recent moment that felt purposeful—a win with a client, team member, or at home. Why did it matter? How can you create more of that on purpose?

### Anchor Statement:

Success isn't just hitting your numbers. It's knowing why it matters—and who it's for.



## Shift 6: From Tactical Hustle → to Trust-Based Leadership

### What This Means:

Hustle can build momentum, but it can't scale. The Purpose-Focused Advisor moves beyond doing the work—to creating trust, casting vision, and leading others.

### Why It Matters:

Clients don't just want answers. They want a guide. Trust-based leadership creates better results, stronger culture, and deeper loyalty.

### Purpose in Practice:

I work with an advisor who grew from \$90 million to over \$700 million in AUM in just over five years. When we started, it was just him and his assistant—and he struggled to let go. He micromanaged, convinced he could always do it better himself.

But with some coaching and honest conversation, he began to see his assistant's capabilities—and more importantly, started to trust her. That one shift led to another. As he grew in trust, he grew in leadership. Today, he leads a thriving team of 11 who love working with him—and he loves leading them.

He still hustles, but now he leads with vision and trust. He regularly asks, “How can I grow as a leader?” And that mindset has created space for extraordinary growth—in both business and impact.

### ✓ Try This: Step Back to Lead Forward

Pick one meeting this week where you normally drive the agenda. Instead, ask one open-ended question. Listen more than you speak. See what opens up.

### Anchor Statement:

Great advisors solve problems. Purpose-Focused Advisors shape outcomes.

A large, rugged, and steep mountain peak, likely a volcano, rising from the ocean under a cloudy sky. The mountain has a dark, rocky surface with patches of green vegetation on its slopes. The sky is filled with soft, white clouds, and the ocean is visible at the base of the mountain.

## **Legacy & Client Purpose**

**Build something that lasts—and help clients do the same.**

# Shift 7: From Chasing Results → to Operating from Purpose

## What This Means:

Chasing outcomes creates pressure. Operating from purpose brings peace. The Purpose-Focused Advisor leads from alignment, not anxiety.

## Why It Matters:

You make better decisions when your foundation is clear. Purpose creates confidence, attracts the right clients, and shapes long-term results.

## Purpose in Practice:

I work with an advisor who's a natural leader. His business was thriving, his team was growing, and unsolicited referrals kept coming in. His firm had been ranked best-in-state several years in a row, and he was recognized nationally within his company.

But despite all that, it wasn't enough.

The growth had become easy. The leadership began to feel stagnant. He was restless, losing belief in himself—and it began to impact his health and his outlook.

We started asking deeper questions: What was driving him? What was his real “why”?

Once we clarified his purpose—centered on being the husband, father, leader, and business owner God called him to be—everything changed. His business still grows rapidly. But now, the pressure's replaced with peace. The anxiousness is gone. He's leading from purpose, not proving himself.

### ✓ Try This: Recenter with 3 "Why-s"

Before your next big decision, ask: 1) Why does this matter to my purpose? 2) Why now? and 3) Why me?

If the answers are clear, move forward. If not, realign.

### Anchor Statement:

Purpose isn't a reward for success. It's the reason you lead the way you do.



## Shift 8: From Client Service → to Client Purpose

### What This Means:

Service is important. But the Purpose-Focused Advisor helps clients go deeper—aligning their money with what matters most.

### Why It Matters:

When clients connect their financial plan to their values, planning becomes transformative. It creates trust, loyalty, and legacy.

### Purpose in Practice:

I recently received an email from a client who was forwarding a message he got from one of his own clients. She told him, *“I don’t know how I would have made it without you.”*

She had just made a major career shift. Her family was leaning on her financially—and emotionally—and she was overwhelmed. She felt like she had no one to turn to.

But this advisor had built a purpose-focused process. One that didn’t just focus on portfolio performance—but helped his clients re-center around what truly matters. Her plan wasn’t just numbers. It was grounded in her purpose. That clarity gave her confidence in the middle of chaos.

That’s the shift—from simply providing service to helping clients live on purpose.

#### ✓ Try This: Ask the Deeper Question

In your next review, ask: "As we look at your plan, is there anything about your purpose—what you care about most—that we should consider more closely?"

### Anchor Statement:

You're not just managing portfolios. You're stewarding what matters most in your clients' lives.

# What's Next: Let the Shifts Take Root

You don't need to overhaul everything overnight. But you do need to choose—every day—to lead from purpose instead of pressure.

Your work becomes more focused

Your relationships deepen

Your success feels aligned, not accidental

And your life starts to reflect the impact you're truly meant to make

This is the path of the Purpose-Focused Advisor.

And if you're ready to go deeper, I'd love to walk that path with you.

# Want to Put These Shifts into Practice?

This guide is just the beginning. If you're ready to align your life and business around what matters most, check out:

## **The Truest Fan Blueprint**

Focus on What Matters to Achieve Your Most Cherished Goals (launching August 2025)

## **The Purpose-Focused Advisor Newsletter and Podcast**

Twice weekly conversations and insights

## **Truest Fan Coaching + Purpose-Focused Advisor Mastermind Programs**

For clarity, community, and unprecedented growth

## **Purpose-Focused Advisor Scorecard Session**

**In this 1-on-1 session, we will:**

- Pinpoint your greatest opportunities
- Identify what's getting in the way of growth and clarity
- Build a personalized roadmap to help you grow your business, lead your team, and serve your clients with deeper purpose
- [Schedule Here](#)

You were created for more—and purpose is the path that gets you there.

Let's go.

-Robb