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
BY ROB BROWN

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WHAT IT MEANS TO BE 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 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.

> **My simple definition of purpose:**
>
> **Leading the life God created you to live - and being intentional about it.**

You don't need to master all eight today.

But you do need to start. Purpose isn't something you find. It's something you live.

Walk through these shifts with fresh eyes. Notice where you are already living them, where you may be stuck, and what one next step could look like.

Let's get started.

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Author, Truest Fan and The Truest Fan Blueprint
Creator, The Purpose-Focused Advisor

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.

- 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?

If something in this guide has you thinking differently about your business or where you're headed, I'd love to hear about it.

Schedule a time and let's talk about what's on your mind.

SCHEDULE A CONVERSATION

SHIFTS 1-3

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 had not paused to ask why they were planning succession in the first place.

As we unpacked their purpose, a theme emerged: they were not just running a firm. They were serving families across generations. Their plan stopped being about retirement logistics and became a message to 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, and 2) one activity that pulled you off-course or distracted you. Do this for five 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 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.

SHIFTS 4-6

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. 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. 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. 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.

TRY THIS: STEP BACK TO LEAD FORWARD

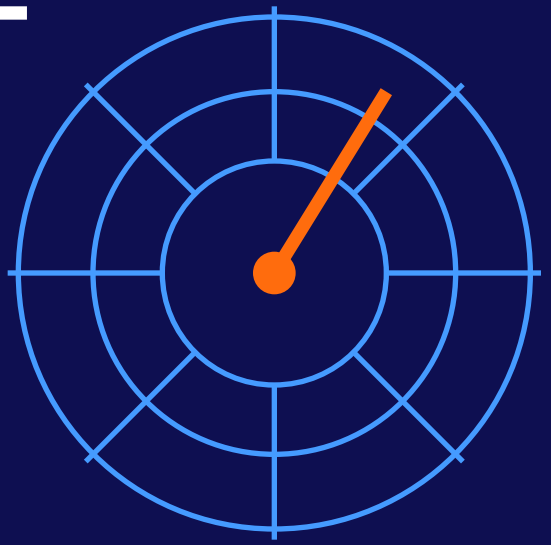
Pick one meeting this week where you normally drive the agenda. Instead, ask one open-ended question. Listen more than you speak. See what opens up.

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

SHIFTS 7-8

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 and losing belief in himself. 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 has been replaced with peace. He's leading from purpose, not proving himself.

TRY THIS: RECENTER WITH 3 WHYS

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

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.

WHICH SHIFT IS YOURS?

You don't need to tackle all eight. In fact, you probably shouldn't.

One of these shifts likely stood out more than the others. Maybe it's something you've been thinking about for a while. Maybe it's something you've been avoiding. Or maybe this guide simply gave you language for something you already knew needed to change.

Start there.

Becoming a Purpose-Focused Advisor isn't about making eight changes at once. It's about becoming increasingly intentional about the business you're building, the people you're serving, and the life you're leading.

> **PICK YOUR SHIFT. TAKE THE NEXT STEP.**

Want to talk about what surfaced for you?

I'd enjoy the conversation.

SCHEDULE A CONVERSATION