



Did You Ever Fall in Love with The Business?

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Many of us arrive at the moment we find ourselves in because of fate, luck, and things beyond our control. When you reflect on your origins in this industry, can you honestly answer why you're here in the first place? Why did you become a financial advisor? Why did you choose to do it as an independent? Why did you take the job?

Or are you like me, and took the job that made sense at the time because someone else offered it, you needed it, and you felt you could be good at it?

My guess is that you are more like me and that your choice was made for you by circumstances beyond your control and your intentional decisions and actions at the time. This means that all these years later, there is the risk that you never fell in love with the business and, as a result, never made the personal and conscious choice to serve relationships ultimately through this admirable profession.



“Your work is going to fill a large part of your life, and the only way to be truly satisfied is to do what you believe is great work. And the only way to do great work is to love what you do.”

Steve Jobs
Co-Founder of Apple Inc.



And so here you are, all these years later; a little grayer, a little wiser, and, for the most part, having succeeded. And so here I am, wondering: **did you ever fall in love with the business?** It is an important question to answer in this rapidly changing industry where competitive forces drive innovation faster than most can keep up with it – an industry where the challenge of change, the challenge of ownership, and the challenge of growth are as real as they have ever been. We exist amid seismic disruption. I genuinely believe that if you cannot answer this important question with a resounding “YES” or “ABSOLUTELY,” then the fortitude and perseverance required to sustain and succeed put your enterprise – and your well-being – at risk.

And by falling in love with the business, I mean the same kind of love required to succeed and be happy as a parent. The kind that endures, strengthens, promotes, challenges, and pushes you to do more than you could have ever imagined. The kind that embraces the challenges, forges deep commitment from self, and measures by testimony – not awards or money. The kind that necessitates a mindful attentiveness that you’re more than willing to provide because, above all, this is your calling.

As a dear friend has reminded me over the years...”for where your treasure is, your heart will always be!”

Why this note now? It is because each of us has a business that has become more complex, requires more attention and time, and challenges how we allocate effort and resources every day. It is because you have been successful and now own a practice that requires more of you, not less. There are more people, more accounts, more products, more competition, and less time to do it all.



As you have grown your practice, you inevitably experience noteworthy moments where you realize that success (and we all measure it differently) has created ceilings of complexity. This success has made the progression toward achieving your dream/vision plan (assuming you even have one) more challenging and uncertain. This is not uncommon – rather, it is the natural evolution of any successful and growing independent advisory practice. We undergo this evolution because most of us are effective in building relationships and compelling those we serve to recognize our leadership.

Said differently, we are good salespeople – and, when given the opportunity to solve a problem, we can find an investment, insurance, or planning solution that a prospect will buy that meets the stated need. Our evolution as advisors that focuses on servant-leading clients' goals and dreams from financial services salespeople brings great awareness of responsibility, obligation, fulfillment, happiness, purpose, and called action.

We are constantly experiencing and learning that as we grow our leadership of others (gain more customers and sell more stuff), more and more time is needed to grow our leadership of ourselves, our teams, and our enterprises simultaneously. More relationships (customers) bring more responsibilities, promises, opportunities, and the need for intentional, perfect effort. Consequently, we are confronted with the reduction in time required to do that which drove the success in the first place due to our need to meet the growing, changing, and developing demands of owning and running a servant-led, purpose-rich financial planning enterprise.

If you cannot envision what I mean by this last statement, then you might take a moment and seriously question your professional purpose and assess if you are simply a salesperson of financial services products. Now, take another moment to further assess the question: are you in love with the business?



Ask Yourself

Are you simply a salesperson of financial services products or are you in love with the business?

And while some of us might recognize that they have the “need” to act more intentionally in managing their enterprise, they most often lack the resources, experience, knowledge, and partnered relationships to do so. And thus, our community, like most independent financial advisors, encounters the inevitable clashing of the demands of our clients and enterprise that creates serious ceilings of complexity and, in many cases, professional challenge and unhappiness.

For those feeling this, the reality is that we are no longer just financial advisors. We are business owners who wake up each day with a never-ending, complex array of tasks and responsibilities that begin to inhibit and limit our growth, happiness, and impact!

Just for the fun of it, let’s list all the distractions and impediments to growing our relationships under leadership:

CRM MANAGEMENT *Product updates*
Human resources Relationship development
Analysis **Prospecting**
Trading *Email* **TECHNOLOGY**
Financial management **Phone calls**
Market updates **Marketing**
Bill paying **Research**
Payroll **Investment research**
EDUCATION *Business submission*
Investment Management **PAPERWORK**
FINANCIAL PLANNING *Compliance*
Continuing education **REVIEW PREPARATION**
Scheduling **Business plan**
Facilities management





Oh, and yeah, client meetings. And let's be honest; each has multiple required roles, duties, and functions.

This complexity results in an advisor that gets good results – not great. They are happy – but not fulfilled. They act with necessity – not purpose. They likely struggle with prioritization – with little flexibility. They have customers – not relationships. They sell transactions – but miss the opportunity to serve. And deep down, when looking in the mirror, they genuinely know that they could do a much better job of caring for those that seek their leadership.

Once this level of self-actualization occurs it becomes obvious that the most important product you have to offer is servant leadership! Your ability to impact those you serve is predicated upon your ability to see the complexity and have a partnered relationship to help you do something about it.

Said differently, it requires you to fall in love with your enterprise and our industry!

I ask you to truly consider how the organizations and people around you can help you rekindle your love for your business, the industry, and the people in your care. Hold those around you and yourself accountable for helping you in these efforts. For over 30 years, our mission at Founders has been to serve others by assisting members in tackling these complexities and discovering purpose. Our community is Built By and For and effectively shares resources and values...why? **Simply because we're stronger together than apart.**



In your assessment, if you discover that it's time to consider surrounding yourself with those more capable of helping you achieve your enterprise dream, think about the following:

- **How would a true partner work collaboratively to create a sustainable, positive impact on your enterprise dream?**
- **What are the “Little Big Things” you can do together to preserve time, provide an opportunity to grow relationships, and help each other fall and stay in love with the business?**

The work you do is essential. Its purpose is grounded in the call to serve others and, through that service, you will find your path to happiness and fulfillment. I realized a long time ago that no better profession could exist – one that, if done well, will lead to personal growth, professional growth, and the economic growth of all engaged. A true win-win outcome!

I challenge you to fall in love again! And use that fuel to drive your enterprise forward!



Our Mission

To positively impact the lives and professions of those we serve, always building a community of spirit and purpose as we grow our collective Human Quotient™





About Bradley M. Shepherd

CEO, Founders Financial

In his current role, Brad's primary responsibilities include overseeing Founders' overall strategic vision, upholding her mission, and Member Partner development.

As the company's steward, Brad is also focused on the future growth of the company.

"Founders Financial is a unique enterprise, built by and for our Member Partners. Unlike the typical broker-dealer who is driven strictly by financial gains, we are motivated by the professional success of our Member Partners and the trusted relationships we have with each of them. This is what differentiates us, and what will allow us to continue to thrive."

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