

# PURPOSEFUL PLANNING

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## Growth that Matters

In our culture, progress is often treated like a race. More clients. More revenue. More productivity. More everything. But somewhere between the early mornings and late nights, many clients begin to feel something different creeping in; exhaustion, disconnection, and a quiet sense that all this “progress” might not actually be progress at all. Growth stops feeling fun and exciting.

I’ve seen countless clinic and business owners feel this pull. They’ve built something successful on paper, but somewhere along the way, the joy that started it all began to fade. Their schedules fill up, the demands multiply, and freedom feels further away than ever. They’re growing, but not necessarily becoming happier, healthier, or more fulfilled.

As an entrepreneur and planner, I’ve wrestled with this tension personally. I love growth. I love building. But over the years, I’ve learned that not all growth is good growth. The kind that comes without clarity or purpose can actually make us feel more overwhelmed.

That’s why I’ve become an advocate for purposeful progress.

## What Is Purposeful Planning?

Purposeful progress is growth that aligns with your true self, your values, your family, your vision, and the reason you’re working so hard in the first place.

It’s not growth for growth’s sake. It’s growth that serves something bigger, a mission. Sometimes that means expanding your business or investing in new opportunities. Other times, it means slowing down, reflecting, and allowing your creative energy to breathe again.

If we never pause to reflect, we risk building something that looks successful but feels hollow.

## The Power of the Pause

Some of the most important work I do each year doesn’t happen in meetings or behind a computer screen. It happens in quiet moments of reflection, often away from the office entirely.

I take time to think, to reset, and to ask hard questions:

What are we really building?

What’s next? Who are we becoming as a firm? How is God working in my life right now? How can we create more value for our clients? Is this the kind of growth that creates freedom — or the kind that consumes it?

Kinda like Michael Gerber mentions in *The E-Myth Revisited* (one of my favorite business books) — many business owners spend their lives working in their business instead of on it. They chase growth, but lose sight of why they started the business in the first place. Purposeful progress begins when you step out of that cycle long enough to think differently.

Those pauses have become sacred time for me. They allow me to see beyond the noise of daily activity and reconnect with my purpose



to build relationships of trust, create clarity for families, and help them steward their wealth toward purpose and impact for generations to come.

It was during one of these pauses that I decided to share this practice with you — because I've seen how powerful it can be to slow down, even briefly, to ask the same questions of yourself and your business.

### Choosing Growth That Matters

I'm not concerned with the maximum number of investment accounts we manage, the total assets under our care, or even the number of client relationships we maintain. What matters to me is depth, working with families who share our values and are intentional about building something lasting. That is what I have discovered during my purposeful planning.

I'm choosing to partner with enterprising, legacy-minded families who view wealth as a tool to create good in the world, not just a number on a statement.

That focus allows us to go deeper. It lets us do our best work, the kind of work that builds meaningful, long-term relationships and helps families steward not just their money, but their mission.

That's the kind of progress I want to make. And that's the kind of progress I want for every client we serve.

### Slowing Down to Move Forward

Without intentional pauses, the pace of business can easily become its own trap. The faster we move, the harder it becomes to see where we're headed.

True growth doesn't come from speeding up. It comes from slowing down long enough to align your vision with your values, your strategy with your purpose, and your daily actions with the life you actually want to live.

So take time to think. To plan. To dream. To ask yourself what kind of progress really matters to you.

When you do, you'll find that purposeful progress isn't about doing more — it's about becoming more of who you were meant to be.

#### **Joshua D Payne, CFP®, AEP®, CLU®, WMCP®**

Financial Planner

Physical Address:

410 N. 9th Street

Osage City, KS 66523

Mailing Address:

PO Box 636

Lyndon, KS 66451

785-828-4296 (fax)

www.paynefs.com