

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



An update from Geni

Dear Friends,

It's time to take a "paws", y'all.

I know, it's crazy with the holidays, yearend work, and life in general - but look where we have been! What a year or couple of years we have been through.

Look what we have accomplished this year so far. We've learned, shared, grown. We've helped countless clients keep their businesses afloat and keep their employees paid. We've applied automation, corrected, counted, and measured. We've shined lights on data and insights that might have previously been invisible to owners and their teams. We have created light bulb moments (aka IMPACT.)

Whether your contributions have been appreciated directly or not, please know that the work you do matters. Your clients need you on their team. That message is everywhere.

I attended two live conferences last week: [Digital CPA](#) and [QB Connect](#) and was so encouraged by the great strides our profession is making. The focus on advisory is strong and spreading fast - and is led in many ways by the Client Accounting/Advisory teams. One of the most memorable keynotes was from [Marcus Buckingham](#), author of [Love + Work](#). His message is to find aspects of your work each day that make your heart sing. Find the love in what you do. I hope you find as much love in your own work as I do in mine. If not, now is the time to fill your heart with joy and to make the impact you desire. Create the life of your dreams, whatever that means for you.

My heart goes out to each of you. May you be filled with joy during the holidays and all year,

Geni



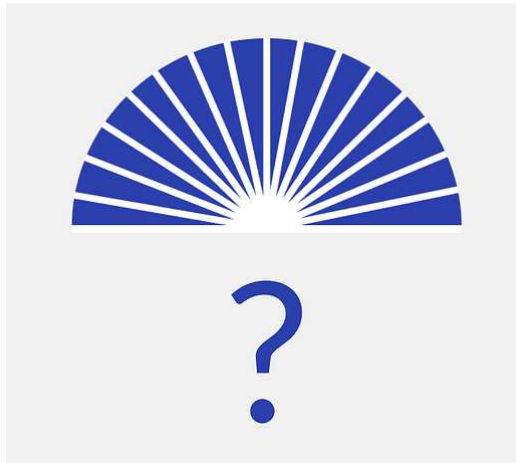
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LEVEL 5

New Year - New Goals

Purchase the [Impactful Advisor DIY Training](#) Program before the New Year & get these added bonuses:

- Instead of 12 months of online access to the [Level 5 Advisor training](#), you get **18 months of access.**
- Includes free DISC Assessment (\$75 value).
- Includes one live coaching session in February 2023.
- Payable in three monthly installments of \$580 each, with bonus **\$50 off your first payment.**

This offer will expire *December 30th*. Use code **QBC22** at checkout to [Sign up now](#) before prices increase in 2023.



Question of the month:

If your client asks "How come things never get done right around here?"

Consider asking them the following questions:

- **Is this a recurring problem?**
- **Is it a people or process issue?**

This question, from Level 4 materials, is an indicator that teams are not getting the information they need to align behind the owner's goals. As an advisor, you can help them document their goals, identify critical success factors, and connect individual actions to company financial goals.



Upcoming speaking events:

1/18-19: DTC Symposium

2/18 Online: GaragisteCon 2023

2/20 LIVE: Thought Leader Symposium



South of the Border Grits?

Have you ever tried Pozole? Also spelled Posole. According to [The Pioneer Woman](#) (author of my favorite basset hound book, [Charlie the Ranch Dog](#)) the spelling depends on your region and "who taught you to cook it."

It's a traditional Mexican soup of the made with pork (sometimes chicken) and **hominy**. Well hominy is what grits are made from y'all, so naturally it's a winner in my book. There is quite a history behind the soup (which I won't get into), but it is a comfort food, meant to be shared with friends and often associated with festivities like Christmas. A South-of-the-Border take on my beloved grits? I'm in!

If you have an authentic, homemade Pozole, I'm in hot pursuit of a great recipe. [Email me](#) I'd love to hear your stories about Pozole.



Advisory Challenges & How to Start

Here is a soundbite from my conversation with Deneen Dias, VP of Strategic Partnerships at [Botkeeper](#) and their new [Accounting Intelligence podcast](#). We discuss the biggest challenges to advisory, how to start an advisory practice, and much more. [Listen now!](#)

Making an Impact

[Blake Oliver](#) is a trail blazer. One of the first true cloud accountants (I think he was 12 years old when I first met him at a Xero conference), he also started a highly

successful [cloud accounting podcast](#) that is driving the profession forward.

Now he's found a way to deliver audio CPE via his latest venture [Earmark CPE](#). Here is a session I got to deliver on his podcast back in [May](#). If you need credits before yearend, check out the topics he's providing. It's not your typical accounting training.



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