

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Mind Over (Tax) Matter

Dear Friends,

Whether you actually do taxes or not, you can join me in celebrating the fact that we've passed one more tax deadline. Getting all of that yearend info together is a pain for everyone involved so - goodbye March 15th, hello April 15th or September 15th or October 16th...

For me, March 15th is another opportunity to celebrate the fact that I am **no longer** (deep sigh of relief) doing taxes. I feel so lucky to work inside a CPA firm but in an advisory role. But I am oh-so grateful for those of you who do taxes - and are good at it! I have some amazing tax co-workers who do wonderful things for our winery clients, and I have a tax person of my own who I adore. You are all so worthy of respect and adoration. I raise my glass to each of you.

Mind over (Tax) Matters

But when I think about the 15 years I spent working on tax returns, what I most vividly recall is not only the late hours and the time away from family, but it was my inability to escape the **mental anguish** I carried - even when I wasn't at work. I went home exhausted and drained from the worry:

- I worried about my clients.
- I fretted about the number of hours it took me to do every assignment.
- And then I worried about how much we were going to bill them at the end of the month.
- I worried about the fact that I might have missed something.
- I especially suffered when I had talked to a client about their refund, only to discover a mistake that meant they were going to owe tax with the final return. That was always the worst.
- I stewed over tax liabilities that I knew my clients couldn't pay.
- I was also worn out by my own internal voice - the one that wondered why I got so many review notes and asked why I couldn't be better at details. I beat myself up for not catching something, or for not getting more done at the end of the day.
- And I wondered - where did all of my billable hours go? That was a killer.

Do you take the burden of your client's results home with you?

I hope you are caring for your clients but **not** taking on the burden of their tax liability, or financial results, or payment issues. I am sure you worry about them too.

Please know that you cannot care for your client's business more than they do.

Are you happy in the work that you do?

It took me 15 years to get to the end of the rainbow (which was making partner in a CPA firm) only to realize I wasn't happy. I didn't have tools or resources back then to help me - or a place to turn for help.

Tools for You

Here are some of the resources I wish I had back then:

- Comedian turned life coach, Kyle Cease, helps people [Evolve Out Loud](#).
- My friends at [WhatsNext.com](#) are coaching people to find their next thing in life.
- Books like [The Universe Always Has a Plan](#) by Matt Kahn offers a fresh perspective.

- Peers in the accounting profession like [Misty Megia](#) that I can turn to for support (and coaching) when I need it. She can help you find your voice.

My Wish for You

I want you to do work you love and to be rewarded for the value you deliver. I want you to see the impact you make in the lives of your clients and to be appreciated for that. **If you are doing that now, keep it up.**

If not, don't wait. Look for ways to change your perspective, or your work, or your life. Take a class that inspires you or re-arrange your office. Seek out clients who see you in a new light. Try something different - visit a psychic, get a massage or read a new book. *Or draw inspiration from [Tricia O'Connor's story in this LinkedIn Live chat we just did.](#)*

And let me know if I can help.

Sending cheers and big ears to you,

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Training Options

In a Group

New [555 Cohort](#) launches 5/5/23 - a six-month program with live classes every two weeks. You also get 12 months of access to the online training.

Take 5% off if you sign up before [April 15th](#) using code **EARLYBIRD**.

On Your Own

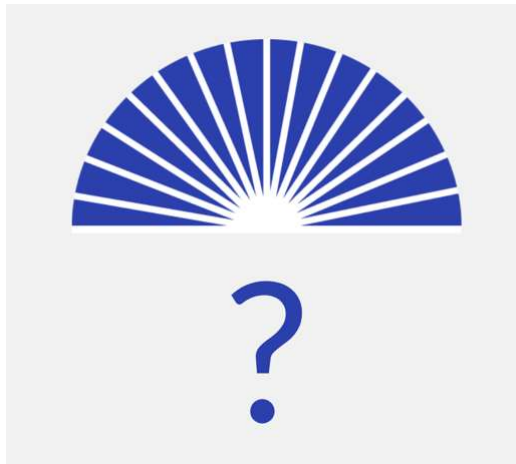
[DIY](#) - Get 12 months of access to more than 100 tools and work at your own pace. Recoup your investment of \$1,800 (payable in three installments) using any one tool.

Hybrid

Other training options are available [here](#).

Graduate Refresher

I've added a second [Tool Time Event](#) for those who have completed the training. This is a monthly meeting for an hour - we meet on the last Wednesday of the Month beginning 4/26. I deep dive into a single tool and share marketing and selling tips.



Question of the month:

What are your clients worrying about - other than banks and banking and such? How can you help relieve that burden for them?

One simple way to start is by capturing their concerns on paper. We use a \$COPE grid in Level 5 training to do that but you can create your own method. Just be sure

not to just ask about financial challenges. Ask about customers, operations, people, and their end in mind as well.



Upcoming speaking events:

Check out my latest podcast interview on: [Energy Stoners Cafe Podcast](#)

4/4 Online: Tool Time! *

*Available to Level 5 Students & Graduates only, [requires subscription](#).

4/19 Online: LinkedIn LIVE - Advisory in Real Life

4/26 Online: Tool Time 2*

*Available to Level 5 Students & Graduates only, [requires subscription](#).

6/27 Live: BKX 2023 . My first time speaking at the [BKX BookKeepers Conference](#) in Dallas, TX



Grits Immunizations?

If you search GRITS in Georgia, you might not find your preferred dining options for this southern delight. Instead of grits, you might just find... your Covid immunization status?? That's right. The state of Georgia has launched this site :<https://www.grits.state.ga.us/production/> Georgia Registry of Immunization Transactions & Services. Whoops!

Making an Impact

Meet **Robina Bennion** - she's a fellow CPA, teaching accountants and others how to align their **Soul~Self~Wealth** in a new beautifully illustrated [guidebook](#).

I have a copy on my desk! Learn more about her at www.robinabennion.com



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