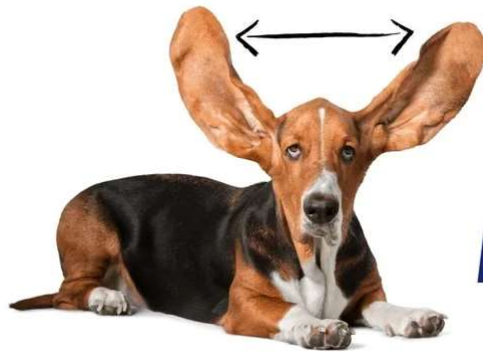


LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Making Space for a Bigger Impact

Dear Friends,

My focus right now is on making space. If you have ever had visitors spend a weekend with you, no matter how special and wonderful they are (grandchildren are the best ❤️) you understand how small a house can actually feel. Not only do we start to notice all of the imperfections in our homes while we are preparing, cleaning, and changing the sheets but once they arrive, suddenly the 1,200 square feet that normally works for two people (yes, that's correct 1,200 - that's how we live in Napa, California y'all) ends up being a crowded disaster for three adults and two children. It's awful to see how inconvenient it is for your visitors - working around office needs to set up the baby bed, finding a quiet room for naps, and scheduling bath time for little ones. What kind of visitor experience is that? Not good!

Once they left, we decided it was time to take action. We are now in the process of investigating and potentially investing in an outdoor shed. We are hoping that by creating a small office space in the shed outside, we can free up a more functional guest bedroom within the house. Stand by for updates as we work through the regulatory issues required to make this happen (again, that's life in California).

But here's the point (and yes, there is one). What does it take for you to make space in your accounting practice for the kind of work you want to do? Are you delivering the kind of white glove service your customers crave? What would a little *extra* capacity feel like? Consider working for only the clients that appreciate you and your services. Maybe focusing on a niche and specializing in a specific industry is the way to go. Or try streamlining your offerings. A little space can have a big impact on your quality of life and the lives of your clients. Maybe it's time to clear out the clutter in your own practice. Here's to creating more space for yourself. **You know, bassets need plenty of space (and that's just for their ears),**

Sending cheers and hope for plenty of space in your life,

Geni



Level 5 in five minutes

What makes the [Level 5 Advisory Training Program](#) a proven, repeatable process that accounting and bookkeeping professionals can rely on to impact the lives of their clients? Give me five minutes of your time and I'll explain: [Watch What Is Level 5 in 5 Minutes.](#)

With the [DIY](#) or [DIY+](#) program, you can review the 14 hours of videos and download all of the materials before the end of the year if you start now.

Plus, payments are automatically financed for free 3-4 months. Do NOT let \$\$\$ stop you from becoming an advisor today: [Watch this video to see how a current student was able to recoup her training cost in one client meeting.](#) Have a question regarding payments? [Email me.](#)

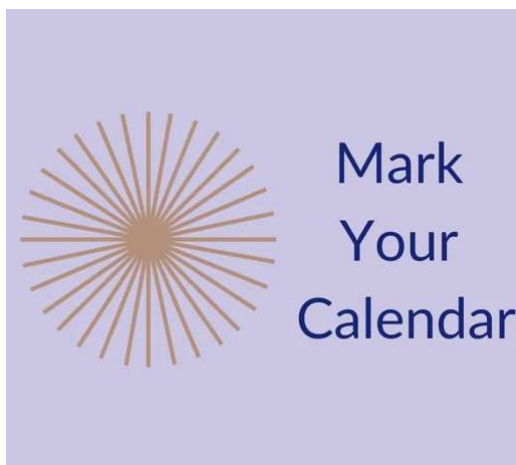


Question of the month:

Which tool should I use with which client?

This is one of the most common questions I get from my students. That's why I have decided to now offer a [DISC Training Class](#). Having an understanding of DISC is a foundational skill to delivering advisory services. Knowing the science behind different communication skills is life changing. [Check out my new 1.5 hour course that includes an online individual assessment and a group webinar debrief.](#)

You do not have to be a current student to purchase this one-time assessment+webinar.



Upcoming speaking events:

9/18 Live Keynote: [Communications Uncorked: NIC 2023](#)

9/21 - 9/23 Live: [Get FREE TICKETS to Botkeepers AI Unchained - Boston, MA](#)
using my **Speaker Promo Code: UNCH23SAVEGW** - Come see me for one-on-one
sessions at [Consultant's Corner](#)

9/27 Online: Tool Time 2.0

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

10/25-10/27 Live: [Thriveal-Deeper Weekend](#)

11/5 - 11/7 Live: [ITA Fall Collaborative 2023](#)

11/13 - 11/15 Live: [QB Connect 2023](#)

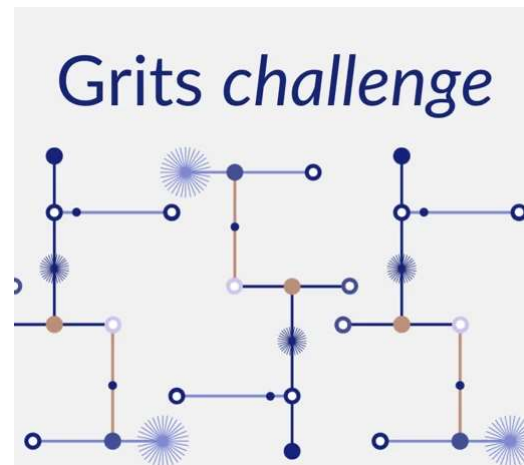
12/3 - 12/6 Live: [Digital CPA Conference 2023](#)



Listen Up!

I had the opportunity to join [Amiee Keenan](#) for [The ISV Society](#) Podcast. I was featured [in this episode](#) to discuss tips on presenting to different audiences, how to capture them, and how to connect them to the content of your presentation - based on my book: [How to Make a Boring Subject Interesting: 52 Ways Even a Nerd Can Be Heard](#).

Take a listen to the full Podcast: [Use Humor to Break Down the Barrier.](#)



Grit Pairings

I know it's hard to believe but September 2nd was [National "Grits for Breakfast" Day.](#)

Now, I know not *all* of you celebrated it, and that's ok, I forgive you. Maybe you don't consider yourself a breakfast person? Well, I'm here to tell you that grits can be eaten any time of day AND paired with literally anything (not just shrimp). Here are [18 Foods to Eat with Grits That Aren't Shrimp](#) from [Tasting Table](#) to get you started.

Making an Impact

"FUN IS A BIG DEAL!" Just ask [The Doctor of Fun - Megan Bendtzen.](#)

Megan is the creator of the **first ever**, fully virtual game show complete with virtual studio audience. Back in April, I had the pleasure of being a contestant on Megan's new series ["Get in the Game Show"](#) designed to improve mental health and wellness and spread joy and positivity in the world. During the game, Megan shared information about the science behind different games and how they impact brain chemistry.

It was energizing and you guessed it...FUN! I played alongside eight other contestants competing for ***absolutely nothing*** and enjoyed every minute! Her show launched August 31st and I'm just so excited for her!

[Click here to watch the Premiere Episode on YouTube](#)
[**where I make my Game Show Contestant debut y'all!**](#)



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