

LEAVE YOUR MARK.

# THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



# Road Warrior

Dear Friends,

Wait! What happened to November??

I hope this message finds you well.

Over the past few weeks, I have been a road warrior and have had the privilege of attending a number of events. At these events, I had the benefit of access to a *multitude* of perspectives on technology and its profound impact on our profession.

My journey began at [Thriveal's Deeper Weekend](#), a gathering of 100 entrepreneurial accounting firm owners. One huge bonus from this trip was getting to visit my Mom in my hometown of Greenville, SC ❤️. Then, I attended the [Information Technology Alliance \(ITA\) Fall Collaborative](#), where I had the privilege of engaging with Tech Pros from the Top 100 CPA firms, including CAS and CIO leaders, as well as Consulting Resellers and Software Publishers, among other Tech Professionals. Next, I had the honor of speaking at [Intuit QuickBooks Connect](#), where I encountered many familiar faces from all of the previous gatherings, and many other accounting professionals. **And now**, I'm gearing up to speak at the AICPA [#DigitalCPA conference](#) coming up next week, where I anticipate reuniting with some of the same individuals who are also learning and sharing.

What lies at the heart of these gatherings is a shared theme - the ever-evolving landscape of technology and how we, as accountants, can position ourselves to harness its potential for the benefit of our internal teams and clients. The intertwining of our work with technology is becoming inseparable, and the pace of change can be intimidating.

**However, what truly astonishes me is the sheer number of remarkable individuals within our profession who are generously sharing their knowledge and dedicating themselves to helping the rest of us adapt and thrive.** I will say, I am also a bit shocked by the number of accountants who **aren't** going to any events at all. How are they keeping up? We are truly fortunate to have access to a wealth of resources and partners who are committed to pushing the boundaries of what's possible. What a great time to do what we do!

As we head into this special season of celebration, giving and gratitude, let's take time to appreciate how far we have all come as we embrace the challenges and opportunities that lie ahead with enthusiasm and make a shared commitment to further progress in the year ahead.

***Thank you for being an integral part of this incredible community.***

Have a wonderful holiday season - I will be raising a glass in your honor,

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P.S. There is still time to take advantage of my discount code **TOP100** to receive \$100 off each payment of the [DIY](#) or [DIY+](#) Advisory Training Program. Remember, you get full online access to the [training and materials](#) for one full year!



## **DISC-overing the Science of Communication**

Learning how to adapt your message to better resonate with current and prospective clients is essential to becoming an advisor. Which is why I am now

offering a [single training session](#) that will help you better understand yourself as well as how to communicate with the client in a way that works for them.

**What's included:**

- [Personal DISC Assessment](#) taken online with your personalized, comprehensive report emailed to you.
- [Live Online Webinar & Debrief](#) that will help you understand your communication style, what it means and how you can leverage DISC in Advisory work with your clients.

***My next webinar is scheduled for Tuesday, December 12th at 1pm PST.***

Whether you have completed the [Level 5 Training](#) or are currently considering it, this session will give you a foundation for working with clients of all kinds. [Sign up here.](#)



## **Question of the month:**

*Ask yourself, what new events might I attend in the coming year? Will they be virtual or live? What do I most want to learn?*

As you make your own plans for the year ahead, consider attending a new event. Try hanging out at a marketing conference just to see how they are using technology. Get some ideas for yourself or learn about a new service opportunity you might deliver.



## Upcoming speaking events:

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

12/6-12/7 Online: [Ensuring Success 2023](#)

12/12 Online: [DISCovering the Science of Communication Webinar](#)

\*Requires enrollment.

12/14 Online: [Mastering Winery Finances](#)

12/19 Online: [Accounting in the Modern Age -Technologies Role in a Digital Future](#)

12/20 Online: Tool Time 2.0

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



## Listen Up!

### Attention: #DCPA23 Attendees

DCPA23 is next week! I will be back at the ARIA in Las Vegas and look forward to teaming up with [Sharon Berman](#) in a breakout session on the topic of [Conceirge - Customer Service](#) focused on elevating your firm's level of service to clients for a more proactive and collaborative experience. See you there!



## Pumpkin Grits 🤔

Check out this interesting spin on grits for the holidays - Pumpkin Grits!

Here's the recipe: [Pumpkin Grits - Delicious Little Bites](#)

And while I know the author offers the idea that, "If you choose to use [instant grits](#), the cook time will be less." May I say friend to friend - don't you even think about using Instant Grits if you make it.

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## Making an Impact

Here's a new organization I just heard about called [VentureLab](#). They are teaching children how to become entrepreneurs. There might an opportunity for you to share what you know with this group!

Check out some of the cool resources they have created here:  
[VentureLab - Youth Entrepreneurship Resources](#)

I have ordered a copy of a book by the founder.  
I'll let you know what I learn.

