

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



FULL of Passion

Dear Friends,

So, in February we gained a day, and this weekend we lost an hour. It feels like our workday, except the math is different - we take two steps forward and one step back. The workload doesn't seem to stop as the to-do list grows; for every item we complete, we uncover another step that is required. So how do we keep going?

I've said it before, but we have to remember **why** we do what we do. We have to really celebrate those moments when someone reaches out with words of appreciation for the services we deliver. Rekindle your passion for this work.

Take this recent LinkedIn post from a [Level 5 program](#) graduate:

"I had an amazing meeting with the team behind a husband/wife-owned-and-operated #lifestylebusiness. You know, the kind of meeting that leaves you feeling so great, you just stop working and replay it over and over."

Every day should be like that. Yes, we have returns to file, or bank accounts to reconcile, or in my case cost of goods sold (COGS) entries to make for a winery client, but we can still reach out to one client and see how they are doing.

Think about the impact you can make for that small business owner who is feeling overwhelmed. And that doesn't mean you have to swoop in with all of the answers. Just ask them how things are going, what are they struggling with. You might be able to offer them a connection to the right professional, someone who can help. Whether it is a banker, a new physician, or even your favorite masseuse. Your network has value!

If you aren't getting feedback that reminds you why you do what you do, maybe you can be the person who does that for someone else. Reach out and spread the love. Sharing with others makes you feel good too.

You are the reason I do what I do!

Feel the love y'all,

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Only Advisory Training Cohort for 2024 starts this May

This is the only chance this year to jump in on this [online group training opportunity with me](#). You already have the foundational skills to become an Advisor. I want to take away your fear and give you the confidence to deliver new services.

You will meet online with me and other likeminded accounting professionals as we cover the [Level 5 Training](#) Materials in depth with real-life examples and group discussions. We will focus on new tools you can bring to the table and how to introduce, price and market these tools to your clients.

The Early Bird Gets the Worm - Use Discount Code WORM24 by Mar.15th to take advantage of my Early Bird Discount (savings of over \$500).*

Sign me up



Question of the month:

What is your best moment at work? What do you love?

This is a great question to ask yourself, but is also a great way to remind your clients of their own passion for the work they do.



Upcoming speaking events:

3/12 Online: [I TALK Tech with Ellen Choi of Aiwyn](#)

4/9 Online: [I TALK Tech with Azunna Anyanwu of Aprio](#)

9/25 Online: Insightful Accountant Future Forward

Who's next? What to join me on LinkedIn Live? I host Advisory in Real Life and talk to folks who are making an impact.



Listen Up!

I was featured on the [Sage Thought Leadership Podcast](#) hosted by [Ed Kless](#) which was a fun, fast-paced conversation where we covered several, relevant topics about the future of our industry.

[Take a listen to our 10-minute conversation here.](#)



Grits Bits?

Ok, y'all I might have just come across either the best snack in America or it could be complete flop - [Grits Bits!](#)

The website claims this snack is voted **Best Georgia Snack** and describes Grits Bits as "delicious bite-sized cheese straw biscuits and cookies baked with grits for a crispy crunch, " with flavor options from sweet to savory.

Hmmmm...what do you think? I might need to send myself a [variety pack](#) to taste test and give a follow-up foodie review.

Making an Impact

[Avalara](#) is a sales tax vendor. But they do so much more for our profession. They address key challenges and gather people from all walks of life to share their perspective. Their color is **orange** and they proudly show up for every key event, ready with support and to share new ideas. [Here is an excerpt from an Avalara Accounting Meta Influencers recent online discussion.](#)



The Impactful Advisor, 2313 Roberto Street, Napa, CA 94558, www.theimpactfuladvisor.com

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