

LEAVE YOUR MARK.

# THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



## A Garden in Bloom

Dear Friends,

I don't know about your area, but where I live, the flowers are gorgeous right now. They are everywhere and these California roses are huge! It's always a great surprise to see (and smell) those beautiful perennials as they return year after year. That's what we accountants used to rely on - perennial clients. We'd plant once (with that tax return or compliance service) and our perennial clients who expected little would stay with us forever. The same is true for bookkeeping services. We used to be able to count on our clients to stay with us month after month, year after year.

*But what if today's clients are more like annuals than perennials? What if they require more care and need to be re-engaged month after month, year after year? How do we keep offering value for those clients?*

### Nurturing Relationships with Advisory Services

In this ever-changing business landscape, clients' needs are evolving, and so should our approach. Here's how we can ensure our advisory services are in full bloom year after year:

1. **Personalized Care:** In the same way those annuals of our need regular attention, our clients benefit from personalized, ongoing support. Tailoring our advisory services to meet their unique challenges and goals shows that we're invested in their success. (Ask about their exit strategy. What are they building to?)

2. **Proactive Engagement:** Annuals thrive with consistent care, and so do our clients. Regular check-ins and proactive advice can help them navigate the complexities of their financial landscapes. This keeps us top-of-mind and reinforces our role as indispensable advisors. (Ask them new questions. Do quarterly [\\$COPE Grid](#) sessions.)
3. **Education and Empowerment:** Learning about plant care is key to caring for those picky annuals. Providing clients with the tools and knowledge they need to understand their financial health empowers them to make informed decisions. This educational approach fosters trust and strengthens our relationship. (Offer [Level 5](#) Financial Fluency Training to teams.)
4. **Innovative Solutions:** Just as gardeners experiment with new techniques to improve their annual blooms, we should continuously innovate our advisory services. Offering cutting-edge solutions and staying ahead of industry trends positions us as leaders in the field. (Ask your clients if they know about Kaizen methods aka the [Toast Video](#).)
5. **Feedback and Adaptation:** Plants aren't immobile. They move to better absorb sunlight. We must be as flexible as they are. By listening to our clients and adapting our services based on their feedback, we are better able to meet their evolving needs. That means we can grow together. (Try a [Profit Equation Planner](#) model with them.)

By treating our clients with the same care and attention that annuals require, we can cultivate lasting relationships that thrive year after year. Sure, you might have to let a few of them go to seed, but just imagine the colorful garden that might be the result of your combined efforts in working with your best clients.

It's time to blossom y'all,

Geni



## DIY Training - Spring Special good through June 15th

The DIY training program is perfect for the independent learner who has the mindset to hold themselves accountable and work at their own pace. Sound like you? Depending on your available schedule, time management and ability to commit to the training, you can comfortably manage the training and get certified in a six-month period. [Click here for my Spring Special to finance the training over four monthly payments of \\$450.](#) Change the way you work before the next tax season.



## Question of the month:

I want to start with my favorite quote:

*“And the day came when the risk to remain tight in a bud was more painful than the risk it took to blossom.”*

— Anais Nin

Is fear of change keeping you from blossoming into a new way of working? Of being happy? Of making changes in your relationship?



## Upcoming speaking events:

**TODAY 5/29 Online:** [Maximizing Tax Advisory Tools with Reasonable Compensation Strategies-CPAAcademy.org](#)

**6/11 Online:** [I Talk Tech - hosted by Geni Whitehouse with special guest Julian Schrenzel](#)

**6/26 Live:** [BKX 2024 - How to Go from No Voice to Influencer](#)

**9/25 Online:** [Insightful Accountant Future Forward](#)

**10/8-10/10 Live:** [AI Unchained 2024](#)

***Be my guest** - I host Advisory in Real Life and talk to folks who are making an impact everyday as advisors to their clients. If you are interested in being a guest on the series, [email me](#).*



## Listen Up!

If you didn't catch the podcast (I can't imagine what else you had to do) check out this episode of Jetpack Workflow's Podcast hosted by Founder & CEO, David Cristello: [Unlocking the Secrets of Advisory, Niching Down, and Communication w/ Geni Whitehouse](#)

...and is "Niche" pronounced: "Nitch" or "Neiche" y'all?

*Coming soon: CPA Trendlines Tax Chat with Seth Fineberg!*



## Derby Grits

And it's grits for the win at the Kentucky Derby! Ok, well the horse that won was not named Grits BUT grits did make it to the [official on-track hospitality menu](#) for the 150th *Run for the Roses*!

This "official menu" is created each year for the exclusive [Woodford Reserve Paddock Club](#). Here is your chance to access the recipe from Executive Chef Robert Lopez for [Herbed Gournay Wiesenberger Grits](#) so you can enjoy them at home.

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## Making an Impact

For this month's version of making an impact, I want to celebrate **YOU!**  
Go look in the mirror because you are making an impact every single day in the lives of your clients.

I hope they are paying you what you are worth and appreciate the results of your hard work. If not, it might be time to raise your prices and find some new clients. But regardless, take time to think about all of the businesses, people, and families that depend on your work to keep them going.

Now get out there and **run for the roses**,  
and **stop to smell more of them**,  
while you're at it.

*I hope you took time to appreciate the life that you have created over the holidays.*



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