

LEAVE YOUR MARK.

# THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



***Be the light  
that helps  
others see***

Dear Friends,

As we head into another month, I've been reflecting on the conversations I've had in recent weeks—particularly at a Thought Leaders gathering and an [ITA](#) board meeting. A recurring theme in both discussions was the growing influence of private equity in our profession and what that means for the future of advisory services. When firms are driven purely by revenue growth and efficiency metrics, the human element often takes a backseat. If you've ever felt the sales pressure during a routine visit to the dentist or noticed how customer service interactions have become more transactional, you've experienced this shift firsthand.

At the same time, we're seeing rapid advancements in AI and automation—tools that, while powerful, are only as effective as the people guiding their use. This has reinforced something I've long believed: in a world increasingly driven by algorithms and bottom-line metrics, the personal touch matters more than ever. Helping clients navigate decisions, understand their options, and address challenges isn't just a service—it's a critical offering of support for people we care about.

It's why in-person events and conferences ([like Scaling New Heights 2025](#)) are so meaningful, and why that phone call with a client makes such a difference. I've had two such calls with clients in the last two days and in both cases, the client just needed a sounding board - they already had the right answer but needed confidence in moving forward.

In the midst of uncertainty, you can be the one lighting the path ahead.

Shine bright, y'all,  
Geni



## It's Tax Season - I get it...

I know you're busy.

Try asking every client just one **quick question** this month:

*"Where do you go to see if your business is on track?"*

That's how you open the door to future services now.



## Question of the month:

**What should I measure?** I think that is the wrong question.

How about shifting the questions to "When should I measure?" and "Why am I measuring?" These require a shift from measuring historical outcomes to measuring inputs and changing behaviors. [We offer a number of tools that can help you answer all three of these questions for your clients.](#)



## Upcoming speaking events:

**3/5 Online:** [I Talk Tech Platinum Series with Special Guest Melissa Dallmeyer of Avalara](#)

**3/11 Online:** I Talk Tech with Geni Whitehouse & Walt Goodfield of RKL eSolutions

**5/6 Live:** [GrowCon 2025](#)

**6/25 Live:** [Scaling New Heights - I'm back to speak y'all!](#)



## Listen Up

"Does Bacon Go with That?" The answer is YES! Bacon goes with everything...all the time. The episode title of [Joel Silverstone's This Feel Right](#) podcast that I was recently a guest on, is one of my favorites. Joel actually came up with the title after attending one of my presentations.



## Interchangeable Grits

Apparently, there is confusion afoot about a topic I have broached in prior presentations - polenta or grits? Well, here's the [official story](#).

*I don't care what they say, I think they are interchangeable and will continue to buy bags labelled "Polenta" to make my grits casserole. (You can't find "Grits" in California.)*

## Making an Impact

🎉 Congratulations 🎉

Aaron Soon, Lezlie Reeves & Sendin Bajric  
on earning their [Level 5 Advisory Certification](#)

Aaron and Lezlie were both part of my 2024 training cohort, where we met up as a group online, to work through the training modules together. Sendin, on the other hand, took the [DIY](#) training course, progressing through the material independently, at his own pace.

All of these folks chose the training path that best suited their learning style, schedule, and need for support—and they absolutely **knocked it out of the park!**

I couldn't be more grateful or proud of them, and I know **big things** are ahead for these new advisors and their clients. Congratulations again!

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