

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



The Banished Bassets

Dear Friends,

How can you help your clients move the needle in the direction of their dreams when the needle is buried in a haystack?

And how can you move that very same needle in your own life if you are buried in clutter?

That's my focus this month: **C³**

Clarity

Clutter

Clearing

Personal Life

We are in the process of listing our house for sale and – whew! The staging lady made us move almost everything out so we could show it. Who knew how many water bottles with logos you could accumulate in a five-year period? (The answer is at least 25.) And why have I kept all of those empty Chai cans I create thanks to my obsession with this [no-sugar-added Chai](#)? She even made me move my collection of ceramic Basset Hounds and canisters out. Can you imagine me having to banish all of my bassets, pictured above? Would my Basset Hound cookie jar really alienate a future cat-loving homeowner?

But despite the lack of homey touches, rugs, extraneous dressers and such (it's not so bad to put on your underwear in the cold garage), it's amazing how much more stress-free our home feels. Why did we wait until we are ready to move to simplify our space?

Work Life

If this feels familiar, not only in reference to your physical space but also in your work, now is the time to set an intention of clarity. Where can you add focus to your work? Are you trying to be all things to every client? Are you taking all comers whether they appreciate the work you do or not? Are you saying yes to every opportunity, networking event, podcast, and webinar that comes your way (or is that just me?) If so, what can you start saying “no” to?

Client Life

And what about your clients? They are trying to uncover needles of their own from very similar haystacks. How can you help them refocus on their own priorities? Help them connect those budgets they just created to specific actions for the months ahead. I bet they are overwhelmed by all of the new tech and AI options just like we are. You can be the business stager helping them keep only the critical tasks on their plate.

I just learned about something called a **Murder Board** at a presentation I gave last week to the CPA Society of Association Executives. It was on the agenda right after I took the stage - *which I have to admit, I was afraid might be convened to murder the keynote speaker if she wasn't good enough...* A Murder Board is a committee of people who are designed to “critically review a proposal and/or help someone prepare for a difficult oral examination.” What if you helped your client get a group of people together to do the same for them and their organization’s strategic plan for the coming year? You could make it fun! Or even murderous.

Here's to finding just the right needles for stitching together your best year yet,

Geni



Big Brain Goals

Most new year's goals revolve around going to the gym, eating better, drinking less...(What? Just so you know, *Dry January* does not exist in the Napa Valley) which are all great things to help our body be the best it can be. But let's not forget about our brain!

Let's motivate ourselves to learn something new. Like how to change the way you work by learning how to provide Advisory Services to your clients using the [Level 5 Methodology](#)!

Use discount code **BIGBRAIN** to get \$100 off your first payment of the DIY+ Training - 12 months access to online training portal *and* once-a-month live webinars with me.

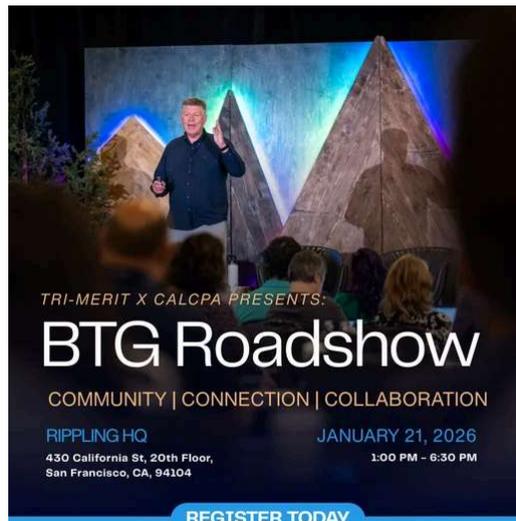
DIY+ payments spread over four months



Question of the month:

Who or what would your committee suggest you murder?

If you were to try this ***Murder Board*** idea for your colleagues/peers to critically review **you**, whether it be a proposal you're submitting, a presentation you are going to give or a report you are creating... looking from the outside in, what do you think they would "murder?"



Come See Me

Upcoming speaking events:

1/21: **LIVE** in San Francisco

[CalCPA x Tri-Merit's Bridging the Gap Roadshow](#)



Listen Up

At the end of last year, I met [Trow Trowbridge](#) of [Brightline Strategies](#) and appeared as a guest on his podcast: [Beyond Tax \\$ZN](#). He has recently become a huge champion of mine through [The Impactful Advisor](#) and I am so grateful and couldn't be happier to have the opportunity to connect with him.

[Check out our conversation:
Making the Client Your Expert](#)



Leftover Grits

You might have heard of **The Pioneer Woman**. Even if you didn't already know her by name, Ree Drummond is a well-known TV chef. A less-likely known fact about her is that she also loves bassetts and has written a children's book series featuring [Charlie the Ranch Dog](#). Four of my ceramic bassetts pictured above, the ones wearing red bandanas, and banished by my real estate stager, are actually Ree's Charlie.

So, in support of my banned Charlies, here's a Pioneer Woman recipe to help you transform your left-over grits into delicious, cheesy cakes!

[Grit Cakes Recipe](#)

Making an Impact

I just learned about this at the recent CPA Society of Association Executives Midwinter Retreat (in Wine Country), where I was honored to speak. The AICPA has a [Benevolent Fund](#) for accounting professionals, supported by CPA societies in many states, including my home state of California.

The AICPA Benevolent Fund was created in 1933 to provide short-term assistance to AICPA members facing financial hardship. If you are a member experiencing challenges due to unemployment, health issues affecting you or a family member, medical expenses beyond

insurance coverage, a natural disaster, or the loss of a primary source of family income, this resource may be able to help.



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