

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Facing Your Internal Dialogue

Dear Friends,

There is a lot of pain in the accounting community. People are trying to find their way to running a successful business. They are leaving their corporate jobs to go it alone and it's scary. Or they decided to stay at home with their baby and build a new career with more flexibility. They have to figure out marketing, service delivery, pricing and billing, and much more, while also doing the accounting correctly. They have to pay the bills and cover payroll. And then there is AI. They may be questioning - How do I keep up? Where will my next client come from?

Much of the pain and suffering we experience is due to our own internal dialogue. Instead of listening to our own true voice, the one I call my inner Basset Hound, we listen to the other one, the one who follows the rules, listens to what other people think, and has a long list of "shoulds" at the ready. I call that one my inner Nun.

When we base our self-evaluation on external validation (or do things out of fear of punishment - our focus is on avoiding that Nun's disapproval), we can drive ourselves crazy. It is only when we align with our internal guidance, focus on our singular purpose, and apply our unique gifts that we can make a difference. When we are doing what we were put here to do, we know it and everyone else does too. They seek us out.

But it's not easy. Shifting our perspective from the Nun's rigid expectations to the Basset Hound's intuitive guidance is the biggest challenge many of us face. This shift requires us to trust ourselves, to silence the external noise, and to embrace the

uncertainty of forging our own path. It demands a conscious effort to prioritize our inner wisdom over external approval, to recognize our intrinsic worth, and to have the courage to act in alignment with our true purpose.

The choice is yours.

Which voice are you going to listen to?

Nun: "You must look and act the part of a professional at all times. Read *Dress for Success* and wear uncomfortable shoes."

Basset Hound: "Be yourself, wear what makes you most comfortable and find clients like you (wear your converse tennis shoes if you want to!)"

Nun: "Your job is to prove to your clients how smart/qualified/perfect you are. Lead your conversation by sharing your years of experience and all of your credentials, skills, and awards."

Basset Hound: "Your job is to make your client feel smarter. Lead with questions about them and their business. They will be able to tell how qualified you are based on how you respond to their answers."

Nun: "Your clients are not willing to pay for advisory services. They won't even pay for basic bookkeeping work."

Basset Hound: "Your clients will be begging for your help when they see how interested you are in them. When you can make a personal connection and take the time to really understand what they are trying to do, you won't have to worry about pricing. You have the knowledge to make a difference in their lives. Believe in yourself. "

I encourage you to find an avatar/character/object that represents your own inner voices and cut yourself some slack. You don't have to be perfect or be the expert or wear the right outfit to make a difference in the lives of your clients. You don't even have to get out of your PJ's if you work remotely. Just be yourself. Share your personality. Connect. You are enough. Spend some time during this holiday week to get clear on who you are and make plans to share it with others.

Woof woof, y'all,

Geni

P.S. I had some of the best Nuns in the world in kindergarten and first grade and wanted to become a teacher myself as a result. They do great work and are devoted to their beliefs. No Nuns were harmed in the writing of this newsletter.



Sweet Success

Our most recent [Impactful Advisor](#) graduate Jason M. Jones had this to say after receiving his certification:

"I am happy to announce that I have successfully completed the Level 5 Certified Advisor (L5CA) program. This training has been the manifestation of what I wish had existed when I started Stratagem CFO back in 2010, as it aligns perfectly with my overall philosophy; this program serves accountants who want to add real value to its clientele and emphasize accounting's true purpose within a business."

We are so proud of Jason and are happy for his clients!!



Question of the month:

Ask your clients: How would you rate the financial fluency of your team on a scale of 1 to 10? Where 1 = "most can't read a Financial Statement " and 10 = "most people understand Financial Statements and their individual impact on key financial results. "

I would be shocked if any client self-scores above a 5. You can help train their teams and introduce a common vocabulary.



Upcoming speaking events:

6/26 DONE - What a great group of people! : [BKX 2024 - How to Go from No Voice to Influencer](#)

7/9 Online: [I Talk Tech](#) - hosted by [Geni Whitehouse](#) with special guest [Andrew Nunez of Scanco](#)

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](#).*

A promotional graphic for the CPA Trendlines Podcast. It features the podcast logo in the top left, which includes the text "CPA Trendlines" and "PODCAST" next to a green circular icon with a white upward-pointing arrow. To the right of the logo, the text "Tax Chat: Overcoming Client Communication Frustration" is displayed. Below this, a circular portrait of a man with grey hair, identified as Seth Fineberg, is shown. To the right of his portrait, the text "Hosted by Seth Fineberg" is written. At the bottom left, the text "Featuring Geni Whitehouse" is displayed. To the right of this text is a circular portrait of a woman with blonde hair, identified as Geni Whitehouse.

Listen Up

In this [CPA Trendlines](#) Tax Chat with [Seth Fineberg](#) we discuss how to improve overall client communication and reduce the back and forth between clients and staff by setting realistic boundaries, timelines and processes.

Incorporate new practices with your clients and staff now to ensure a smoother tax season for next year!

[Tax Chat: Overcoming Client Communication Frustration](#)



Grits - History

Check out [this guide](#) to everything you always wanted to know about the different types of grits. But please, don't even think about eating those instant grits in a package! Ick!

Making an Impact

I recently attended Engage 2024 and was honored to be recognized by the [AICPA and CPA Practice Advisor as one of the 2024 25 Most Powerful Women in Accounting.](#)

To share the stage with twenty-four other kicka\$\$ women making power moves and shaking up our industry was truly an honor.

[Congratulations to these amazing, game-changing women, many of whom are also dear friends:](#)

[Lara Abrash, CPA](#), Julie Boland, CPA, [Samantha Bowling](#), [Jeannine K. Brown, CPC](#), [Danielle Supkis Cheek, CPA](#), [Avani Desai, CPA](#), Kimberly Ellison-Taylor, CPA.CITP, CGMA, [Angie Grissom](#), [Orumé Agbeyegbe Hays, CPA, CGMA, MST](#), Yvonne Hinson, CPA, PhD, [Ebonie Jackson, CPA, CGMA](#), [Gyrlaine Saint Juste, SHRM, SCP, CAE](#), [Lexy Kessler, CPA](#), [Stacie Kwaiser](#), [Jennifer Leary, CPA](#), [Kelly Mann, CPA](#), [Carla McCall, CPA, CGMA](#), [Jessica McClain, CPA.CITP](#), Anna Mok, CPA, [Michelle Golden River](#), [Lindsay Stevenson, CPA, CGMA](#), [Michelle Lloyd Thompson](#), [Amy Vetter, CPA.CITP, CGMA](#), [Jennifer Wilson](#)



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