

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Facing What's Uncomfortable Head On

Dear Friends,

Let's all just take a collective breath. Shall we?

There's a lot going on in our world and in our lives right now. It's hard not to feel the heaviness of it. But we need to find a way to change our perspective. To find the good in every challenge and the lessons in every roadblock. I don't mean we should all put our heads in the sand. There is real heartbreak and tragedy happening and avoidance is only a temporary fix.

So let's narrow our focus to the things that *aren't* broken in our lives.

Have you got clients? Yay!

Are they paying clients? Even better.

Are they appreciating the work you do? They better appreciate you, if not, it's time for new clients.

What do you have to celebrate? It could be your favorite cup of coffee.

How is your family? Your health? Celebrate any positive aspects.

What have you learned from prior difficulties? Mine have taught me empathy.

Do you have a favorite comfortable chair? Go sit in it.

Do you have a pet? Cuddle with it. (Unless it's a hedge hog.)

I went to a peaceful gathering of folks supporting our local community - the farmers who make Napa Valley special. Without them, there is no Napa Valley wine. These are scary times for farmers and their families. I was encouraged to see the collective love that was being expressed. It made me proud of my town and its people - that's where I choose to put my focus.

It wasn't much, but it was a **moment**. Maybe that's all we can do right now. Take small steps forward for yourself and those around you. Be present with the good things that continue to happen and the people who show up for you. Find a new perspective. Make a difference in one person's life. Improve their day and watch yours improve as well. Send prayers for peace to all those involved in conflict.

May your steps forward leave a path for others to follow,

Geni



Our Group Training is in Full Swing...

...together we just wrapped up the debrief of each cohort member's [DISC Assessment](#) and discussing how what communication style means for client interactions.

You too can register to [take your own assessment](#) and meet with me online for a one-on-one debrief of what your DISC results mean for you and how you can apply these insights in your client work.

You do not have to be a trainee of the [Level 5 Advisory Program](#) to benefit from this [Assessment & Debrief](#).



Question of the month:

What have you learned from the most recent challenge you overcame?

If there is an unresolved challenge in your life, know you are not alone. Look for the message in that challenge.



Upcoming speaking events:

6/25 Live: [Scaling New Heights - I'm back to speak on Wednesday.](#)

7/20-22 Live: [Internal Tech Leaders Summer Meeting](#)

11/2-4 Live: [ITA 2025 Fall Collaborative](#)

11/12 Online: [Ask the CAS Expert](#)



Listen Up

I had a great conversation with Zane Stevens on his podcast Protea Conversation. [Watch Episode 37 on YouTube here](#) or listen online via the podcast app you already love.



A Grit Gesture

I recently attended AICPA & CIMA's [Engage 2025](#) event where the folks at [ADP](#) were handing out complimentary copies of [Grit & Wisdom: Smart Advice from America's Hardworking Small Businesses](#)

If you didn't attend the event, you can still claim a [free copy through the fillable form here](#). Grab a copy, write a personal note inside and hand-deliver it to a small business you are pursuing as a client or to one of your favorite small business clients.



I'm speaking at Scaling New Heights
2025!

Keynote - Wednesday Main
Stage

Orlando, Florida, United States



Geni Whitehouse

**MAKE IT
SO**

SCALING NEW HEIGHTS 2025

Who's coming to Scaling New Heights 2025?

I am so happy to be returning as a speaker at [Scaling New Heights 2025](#) in Orlando next week. I'll be hitting the mainstage Wednesday, June 25th at 9:00am EST. The team at Woodard have put a video together to help you get the most out of your experience at Scaling New Heights this year. Here is what you should know, before you go to: [Maximizing Your Success at Scaling New Heights 2025](#).

I'll see you there!



Meet June!

June is the beautiful basset "fur-baby" of one of the incredible board members volunteering their time at the Florida based non-profit:

[Suncoast Basset Rescue](#)

their mission is "...to rescue, rehabilitate, and rehome stray, abandoned, shelter & owner surrender basset hounds just for the love of the breed." The basset hound breed has brought such joy to my life. I am fortunate to have made a connection with the volunteers who run this non-profit for these big-eared bundles of love. I am happy to support their efforts and you can too by following them on [Instagram](#) or supporting their rescue efforts through their [Amazon wish list](#).



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