

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



School Begins & Planning for Yearends

Dear Friends,

Well, our summer is almost over. It's back to school and time to plan for a strong yearend for yourself and your clients.

Like every other season, day, month, and week 🤔 **now is the time** (when isn't it the right time?) to sit down with your clients. Ask new questions: find out what they are worried about, where they are spending too much time, and what has changed in their business. They will be thrilled to talk about it with you,

Here's how I know.

I just finished a Zoom call with a new advisory client. I talked with two business owners for an hour about their financial results, where they could make changes and how to change their proposals (and their pricing) to better meet their cash flow goals. Their books weren't prepared by me -- the owners just wanted someone to show them what to review in their Financial Statements and to help them understand the implications of different line items. This will likely lead to additional work to help them dial in to individual project profitability and create a *Profit Equation Planner*™ model. I am billing by the hour as it is not our typical client (they aren't a winery but provide services to wineries). I began this engagement with a *\$COPE Grid* (from the [Level 5 Training Program](#)) to help them organize their thoughts so they could get clear on where they might need help. This alone gave them great relief. They were doing very well in many aspects of their business.

Here are some key points:

1. I didn't do anything magical. I just pointed out a couple of things and made notes in Excel for them to follow up on.
2. They were so appreciative of that hour we spent. They were relieved that the books were in good shape (and seemed to be well-prepared by their bookkeeper.) How relieved is your client when you send them their financial statements? Do you talk with them about the results?
3. Their bookkeeper doesn't talk to them about this kind of stuff. They were afraid to ask questions.
4. What if you could build in a one-hour conversation with each of your clients? What price might you charge for that service? How much could you add to your existing services to include that hour? How many conversations could you have if you let go of your lowest paying client?

Your clients need you. You need to get the recognition you deserve and make space to create the life of your dreams.

And if you aren't using [Fathom](#) yet with your clients - why aren't you? Check out my recent interview with the Fathom team where I [explain how it works](#). (And y'all know I hate to be called an "expert". It's my clients who are the experts in their own businesses.)

Let your inner basset shine y'all,

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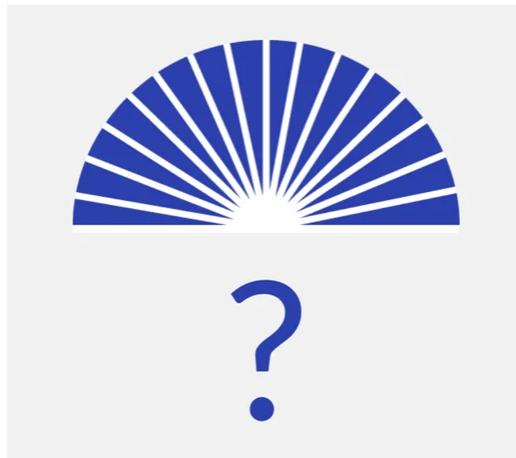
Why DIY?

When you sign up for the [Do-It-Yourself training program](#) here is what you can expect:

- A 12- Month subscription to the [online training program](#) for learning at your own pace, on your own time.
- Access to 100's of tools including instructional videos, downloadable slides and licensed documents with guides on how to use them with your clients.
- A [proven methodology](#) created by Edi Osborne for accountants and tested over 20 years.
- Free financing of the \$1800 fee over the first three months.

[Course graduates have changed their practice and seen increased revenues by using just one of the more than 100 tools.](#)

Are you ready to make an impact?



Question of the month:

What other powers might you unleash to benefit your clients?

- Forecasting
- Dashboarding (more fun than skateboarding)
- DISC training
- Why consulting
- Financial Fluency Training (from Level 5 toolkit)
- And so much more



Upcoming speaking events:

8/23 Online: Tool Time 2.0

*Available to current Level 5 Students & Graduates only, [requires subscription](#).

9/18 - 9/20 Live: [Communications Uncorked: NIC 2023](#)

9/21 - 9/23 Live: [Get FREE TICKETS to Botkeepers AI Unchained - Boston, MA](#) using my **Speaker Promo Code: UNCH23SAVEGW** - Come see me!

10/27 Virtual Panel: [Thriveal-Deeper Weekend](#)



"You've never heard of grits?"

Have you seen the 90's classic - [My Cousin Vinny](#)? The comedy starring the memorable Joe Pesci and even earned Marisa Tomei an Academy for Best Supporting Actress.

For those who have seen it, who remembers the grits scene at the diner? Anyone? No....just me??

Joe Pesci's character: "Sure, I've heard of grits. I've just never actually seen a grit before."

Well, here is the clip for your viewing pleasure: [My Cousin Vinny Grits Clip](#)

Making an Impact

If you have a child in your life, you need to know about this rockstar accountant who has written a book just for you. She's one of the 40 under 40 thought leaders who is changing the world.

Meet Roslyn Banks, EA, author of [Adelaide the Accountant](#), a children's book about, you guessed it, becoming an accountant. Here's how we encourage our children to join our profession! You can find her on LinkedIn [here](#).



The Impactful Advisor, PO Box 476, Napa, CA 94559, www.theimpactfuladvisor.com

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