

LEAVE YOUR MARK.
**THE IMPACTFUL
ADVISOR**
MAKE AN IMPRESSION.



An update from Geni

Dear Friends,,

Well that holiday went by fast, didn't it? It's a great time to be thankful for many things, including the opportunities that we have to make a difference.

As I look back on the period from the launch of the Impactful Advisor in 2020 to today, I realize just how grateful I am (by the numbers, of course):

One brand new [website](#)

Two CPA firm group trainings and 2 students in my very first [Cohort](#) (special thank you Sherri Lee Mathers and Tanya Hackman Hilts for being brave)

Three scholarship opportunities (1 from [Ben Stein](#) at [Keeper](#), 2 from [Alison Ball](#) at [Liscio](#))

Four monthly payments for the [group training program](#), so I can make it easier financially for students to sign up

Five GOLDEN Levels (in the [Level 5 Advisory Training](#))

Six \$COPE Discovery tools

Seven cohorts in progress (or completed so far)

Eight LinkedIn Live guests for my new live series ***Advisory in Real Life***

Nine transposed numbers - this is my favorite magical number which identifies transpositions in columns of numbers that are added

Ten toast video showings this year (for Kaizen training)

Eleven scholarship applicants - thanks to the last [Liscio](#) campaign

Twelve months of hanging out with the ***Movers & Shakers Cohort*** (our last class is in December)

*And, finally, a total of **73 advisors** have been licensed in these tools!*

There are so many more people to reach with The Impactful Advisor Program, but I have so enjoyed getting to meet all of the students and webinar attendees and even more individuals who have connected with me. I am so very grateful for all of your support and for the great work you do for your clients.

I give thanks for each of you and hope you are healthy and happy,

Geni



Accredited
Impactful
Advisor
LEVEL 5

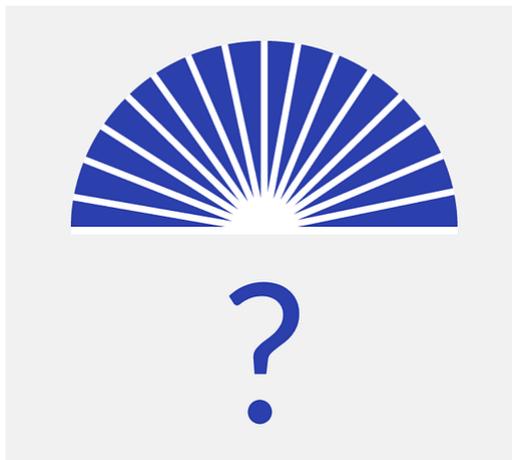
Share Your Thoughts: Group Training Alert!

Attention Bookkeepers: I am considering a February group training aka [Cohort](#) launch in 2023 but want to navigate doing so, based on time of year and interest level of all of you. **How can I make group training work for you?**

Access the survey [here](#).

I appreciate your input in advance!

Also stay tuned for more information on a [May 2023 Cohort](#) for the rest of you.



Question of the month:

"Are your most critical processes documented?"

Ask your clients if they have standardized procedures for their critical tasks and if so, are they documented. Find out if new team members are trained on how to apply these processes. If not, you can convene a meeting of everyone involved in key processes and help get them documented. We call this process mapping in the Level 5 tools.



Upcoming speaking events:

11/30 Online: [Know Before You Go - Pre-QBConnect Webinar](#)

12/7-12/9 LIVE! [QB Connect 2022](#)

2/18 Online: [GaragisteCon 2023](#)



Grits Schoolin'

So, apparently not everyone knows what grits are, or even how to eat them correctly. Here's what the experts at [Real Simple](#) want you to know about them. And note: they say polenta and grits *aren't* the same thing. Depends on who is doin' the cookin' y'all. *I eat yellow grits and I don't care what the label calls 'em.*



QB Connect - Know Before You Go

I can't believe it. QuickBooks Connect in Las Vegas will be here before you know it! Who's coming??

This Wednesday (Nov. 30th) at 9am PST, I get to take part of "[Know Before You Go](#)" a roundup of 8 expert panelists to talk tips and share **#qbconnect** sessions they are excited about.

This is a great group y'all: [Dave Kersting, MBA-HCM/HRM](#), [Dawn W. Brolin, CPA, CFE](#), [Debra Kilsheimer](#), [Geni Whitehouse](#) (me!), [Heather Satterley CPA](#), [Kelly Gonsalves](#), [Kristen Nies Ciraldo](#), [Mariette F. Martinez](#) and [Alison Ball](#). Join us. We are going to have some fun!

Making an Impact

Earlier this month, I took part in a "Meta-influencer" roundtable discussion courtesy of [Avalara](#) and [CPA Practice Advisor](#), moderated by Dan Hood, editor-in-chief of [Accounting Today](#). The focus of this discussion was on the present and future of advisory services. Talk about "Making an Impact." I got to spend two hours with some of *the* "top influencers" in our industry - each of whom equally influences and impacts not only me, but the entire accounting profession.

[Click here](#) for the article on CPA Practice Advisor.



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