

# THE IMPACTFUL ADVISOR



An update  
from Geni



## Introducing The Impactful Advisor

Dear friends,

Welcome to my newsletter! Every month, I'll appear in your inbox to share details about any upcoming appearances, news about my programs, and industry insights that go beyond the 280-character limit of [Twitter](#). And—*obviously*—I'll have to include occasional breaking news about grits and basset hounds.

In honor of beginnings of all kinds, here's an excerpt from my book, [How to Make a Boring Subject Interesting](#):

*"Most writers will tell you that they hate to face the blank page. And it's no wonder. **It's easy to feel paralyzed** at the beginning of a project.*

*The white screen or page is like a mirror for your brain: completely devoid of thoughts. The flashing cursor is a menacing little bug. If it had a voice it would be saying, 'Take a break. Do something else. I hate this. **I'd like a donut.**'"*

**Starting a new line of business is like that.** It's how you feel when you first start offering advisory services. You feel like you're jumping off a cliff— into the void. Like you're promising to deliver services without any real idea of where you might land. I felt like that when I first started working with wineries in Napa Valley. I arrived in the middle of Napa Valley (by way of Atlanta, GA) filled with concepts of how to *teach* advisory, thanks to my speaking career and work with Mentor Plus concepts as a software vendor. But I hadn't actually tried sitting down with a client, asking different questions, trying to help them move the needle on their business, or helping them define their "WHY."

**But I had a set of tools that gave me the confidence to try.** I had training that I knew worked and had been tested with CPA firms around the country, with real clients.

When I sat down for my first meeting with a Napa Valley Winery, I was terrified. Not only could I not afford to buy even a bottle of the amazing wine they sold, but I also didn't know anything about how wine was made. The voice inside my head was screaming, "What do you know?" But that other voice, the one that was softly trying to be heard was coming from a deeper place. It said, "Trust the process. You don't have to have all of the answers. Just listen. You just might be able to help them see things in a different way."

And now after more than 13 years of working with wineries, I can afford a few of their wines (in those smaller bottles), I know these tools work, and I have learned to trust the process and the Level 5 training I received.

**I want you to know what it feels like to make a difference for your clients.**

I want you to have the confidence to ask different questions.

And I want us both to join together to make a positive impact in the lives of companies and their people all over this planet.

That's what this newsletter and this new venture are all about.

Can't wait to hear from you,



## Become An Accredited Impactful Advisor

The Impactful Advisor is here to help you take your firm to the next level.

As part of my inner circle, y'all get early access and 10% of [all program levels](#) using the code EARLYBASSET.

## Question of the month

"Where do you see your business in 5 years?"

Every month, I'll share a favorite advisory-related question.

Discover more resources in my [Mentor Plus Level 5 Advisory Training](#) program.



## Upcoming speaking events

8/5-8/6: [Bottles, Brews, and Buds Conference](#)

11/3-11/5: [AICPA's Women's Global Leadership Summit](#)



## Where have you had grits?

I make it my mission to discover grits on restaurant menus around the world.

Where did you find grits recently? Reply to this email and let me know!

*And no, I'm not talking about polenta.*



Even A Nerd Can Be Heard, 6514 Washington Street, #3898, Yountville, CA 94599

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