

THE IMPACTFUL ADVISOR



An update from Geni



Revisiting Our Why

Dear Friends,

I have launched three new cohorts this month. Each group journey begins with a review of DISC communication tools for participants and an understanding of individual communication differences. We then have a discussion of [Simon Sinek's: WHY](#) and I ask participants WHY they became accountants. It's not always easy to articulate. Many of us become so lost in the *doing* that we forget the underlying *being* and *why* we are here on this earth. Each time I share my own **WHY**, I remember how far I have come on my own journey, and how much I enjoy the work I get to do each day.

I believe there is magic in the numbers. I exist to release the magic in those numbers, so more people can apply them in building the life of their dreams. That's why I am on this journey to train more magicians, like you.

What do you believe? Why do you exist? Your answer should include what you exist to do and the impact it makes in the world. There is no better month

than February, the month of **love**, to really reflect on the work you are doing. If you don't find joy and love in showing up each day and making a difference for your clients, it might be time to dig deep and figure out what you really believe.

I know it's a busy time of year for everyone, but it is also the best time for you to make a real difference in the lives of your clients. Start asking them different questions now and position yourself for summer discussions.

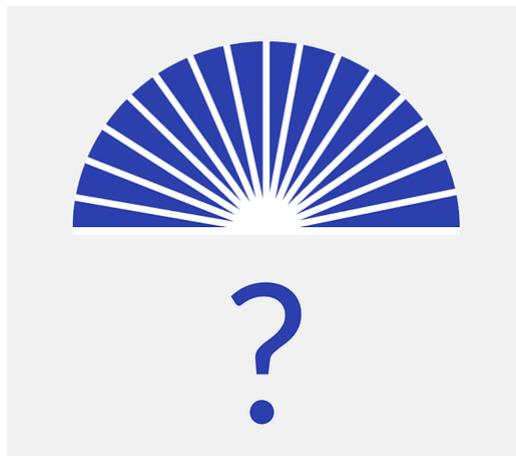
With Love,

Geni ❤️



Magic in Numbers: 555

Do you believe in the magic of numbers? I like to look at repeating number patterns and this one appears regularly for me. 555 means that significant change is imminent. I am therefore launching my **5th cohort** of the year on **May 5th** for the special discounted price of **\$5,555**, payable by a **5 month subscription** of \$1,111 per month. (1,111 holds special significance and reminds us that we are all one.) This cohort will be limited to 15 people and will last for 6 months.



Question of the month:

Ask your clients what they love about the work that they do first and then find out what they hate to do.

The answer they share is an opportunity for you to help them find their way to doing more of the fun stuff and less of the work they don't enjoy. You can help with applied automation, team training and education, and more consistent application of internal processes.

Start planting the seeds now for more conversations over the summer.



Upcoming speaking events:

2/23 Online: [LinkedIn Live: How Automation Supports Advisory Services](#) **3/4 Online:** [Combatting Common Time Wasters In Your Accounting Firm](#)

4/24-4/27 Live: Padgett Business Services, Pointe Vedra, FL

5/9-5/12 Live: [Accounting Web Summit](#), San Diego, CA



Grits Fun Fact

I just came across this article ["Grits: They're Not What They Used To Be"](#) .

I learned something interesting about my home state of South Carolina: *"In 1976, South Carolina declared grits the official state food, stating that grits are a 'symbol of its diet, its*

customs, its humor, and its hospitality... [and it] has been a part of the life of every South Carolinian of whatever race, background, gender, and income." Grits bringing unity, I love it!

Here's my favorite quote from the article: *"A (wo)man full of grits is a (wo)man of peace." I wonder if I can fit that on a license plate or T-shirt?*

I'm also quite proud of my affiliation with the "grits belt"!

Making An Impact

"First, your mastery is amazing! Thanks so much for sharing in your presentation with regards to KPI's, Advisory, Dashboarding, and being an all-around 'kick-ayuss' (I'm from the South too) Advisory Consultant. I found the snippet [of your Strategies To Actions worksheet] that you provided during training has already been a game-changer for me, as I immediately included it in a client meeting that I had just moments after the training. Your knowledge and style of presenting it, has inspired and awakened my senses to become an even better, trusted advisor, to my clients. Thank you again and again. I hope to join in other presentations to take in more of your knowledge and expertise."

– Enae Jackson-Atkins



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