

# THE IMPACTFUL ADVISOR



## **An update from Geni**



### **You survived another tax season!**

Dear Friends,

For those of you who still do tax work, you can finally appreciate flowers, trees, and sunlight again. Hopefully the rest of you are taking full advantage of the longer days and aren't bogged down in other client service. And I hope you got your own taxes filed on time. One year, while I was actually still doing taxes, I somehow forgot to file my own extension and had to stop at the Post Office on my way to a much-needed vacation and mail one. Ooops!

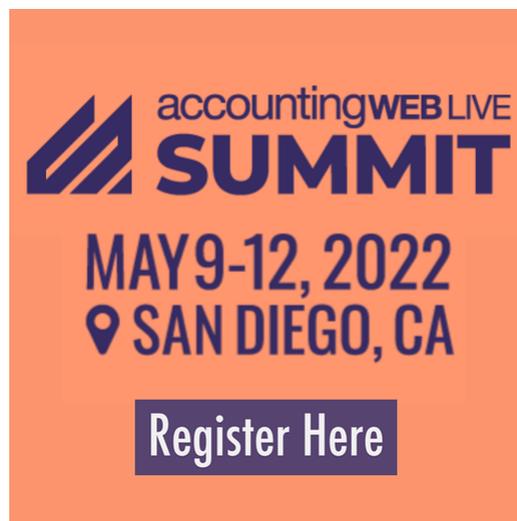
I have been hearing a recurring theme in my life this month - coming from a number of different sources. It has to do with the difference between knowing and doing. It's the source of much tension in our daily lives. For example, I know I shouldn't eat that ice cream for dessert, but I do it any way. We do it all the time. We know something but don't actually apply it. We learn new tools, gain some new insight, or hear about some new idea or process that others are using. BUT we never quite get around to doing anything with it.

Our clients have the same problem. Think about how much data they have at their disposal. They might **know** that their bottom line is not where it should be. Or they **know** Susie or Matthew is not doing well in his or her job, but they don't do anything about it. They **know** their debt is too high relative to their own equity investment, but who has time to do anything about that? They **know** they need to hire a GM to manage their business, but they are too busy to take action (even if it will make them less busy in the long run.) Sound familiar? We do it ourselves.

That's where there is opportunity for us in an advising role. When we help these owners uncover the drivers of their business and then teach them how to apply them in changing behaviors, we make magic happen for them! We help them take what they often instinctively **know** and back it up with data. And then we help them create measures that inspire and motivate their teams to achieve different results. We create alignment and connect insight with action. **Knowing becomes doing!** It is life changing for them and for us.

How can you take what you know, and bring it to life by doing?

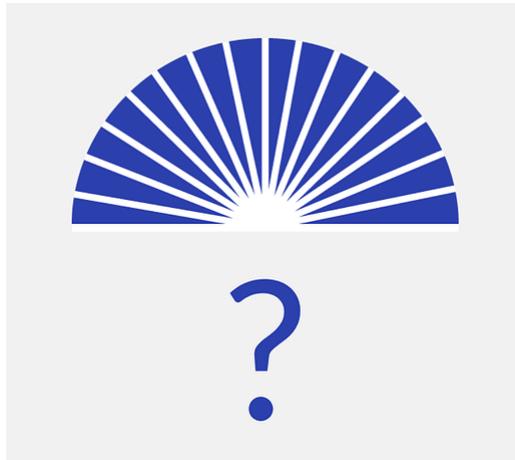
Let's make some magic happen,  
Geni



## Use Code **GENI25** for reduced ticket price!

Vacation Season is Here! It's time to treat yourself and join me in beautiful San Diego for [Accounting Web Live Summit](#) May 9th-12th, 2022. I'm speaking LIVE, in-person, alongside some outstanding professionals in our industry. Check out the line up [here!](#)

And...if you use **GENI25** as your access code when you register for your AWEB event tickets, you will get a 25% discount towards your registration to the summit! Register [here](#).



## Question of the month:

Ask your client:

**Where does waste exist in your current processes? Do you need to streamline the flow of information through any areas of your business?**

Helping your clients capture and review their processes is a great way to make an impact. Your outside perspective and ability to ask new questions can serve you well in creating a process map.



## Upcoming speaking events:

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

**4/26 Online:** [Bookkeepers Group of San Diego Virtual Meet Up](#)

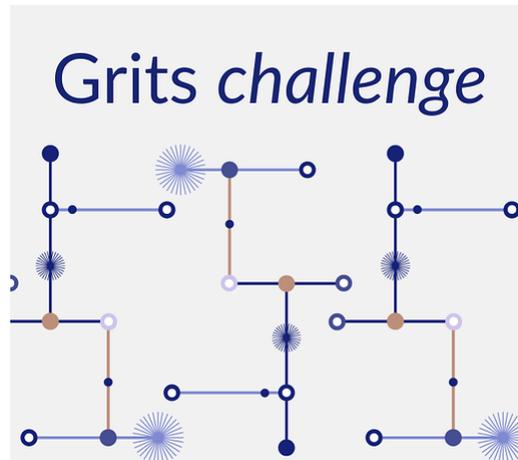
**5/2 Live:** [Accounting Salon 2022](#), FL

**5/6 Online:** Liscio Presentation on CPA Academy

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

**5/10 Online:** [Get Your Shift Together in Your Accounting Firm](#)

**5/18 Online:** [Combating Common Time Wasters in Your Accounting Firm](#)



## Goodness from Grit

As you may or may not know, the customers I serve at [Brotemarkle, Davis & Co LLP](#) are all Napa Valley Wineries. I came across a [Simi Winery](#) ad recently that caught my eye: "Goodness From Grit." They had me at **grit** so naturally, I had to further investigate. Turns out, they have this extended marketing video: [Goodness from Grit: The Untold Tale of Isabelle Simi](#) If you have four minutes to spare, it's rather silly with an old time western feel, that celebrates a woman considered to be a pioneer in her industry!

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## Making An Impact

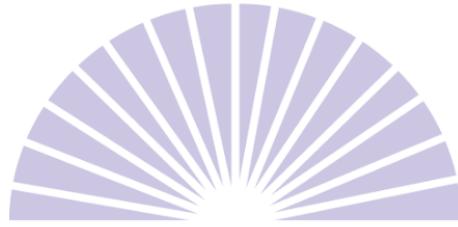
### No More Tax Season, Make Me an Advisor! The 555 Cohort

I am launching my **5th cohort** of 2022 on the **5th** day of the **5th** month of the year (**5/5**). I have only 10 spots left for *financial magicians who* share my belief that **there is magic in the numbers!** My mission is to *release* the magic in the numbers so clients can apply them in creating the life of their dreams.

I'm looking for fellow magicians who want to do the same. This is a six-month group training course is at a reduced rate with special financing terms for (you guessed it)

**5** equal payments over **5** months.

Don't wait another tax season! Sign up and start changing your value and the way you work today: [The Impactful Advisor 555 Cohort](#)



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# 555 COHORT



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