

LEAVE YOUR MARK.

# THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



## An update from Geni

Dear Friends,

Have you ever thought about making a change? It's scary, isn't it? But it's far scarier to think about waking up every day for the rest of your life *dreading* the day ahead.

**Are you doing what you love?** If not, what's keeping you from doing so? If so, do more of it! If you're not sure what you love, there is an [online assessment](#) you can take created by [Pat Lencioni](#), author of a ton of great business fables, most notably, "[The Five Dysfunctions of a Team](#)." The [Working Genius Assessment](#) costs \$25 to take and I highly recommend taking it. It helps you identify the aspects of work that you most enjoy.

I have the amazing good fortune to wake up every day knowing that I am doing the work I was meant to do. I get to teach and learn, listen and speak, think and grow. I have diverse opportunities and lots of challenging projects. Not to mention all the great people I get to work with. Lots of great people -- co-workers, clients, and peers. And I'm in wine country. How did THAT happen?

**But it wasn't always like this.** I spent 15 years doing tax work. I never felt satisfied and always felt I wasn't good enough. I seemed to take longer than others in my firm to create work that always seemed to have errors. I would arrive home a

zombie in the wee hours of the morning - especially during tax season. Oh, the tax seasons! **So, I left the firm the day I made partner.** It was a terrifying leap! But I knew I had to do it. Even though I had no roadmap.

It wasn't until years later that I took a DISC (Communication Styles) assessment which showed me how different my wiring was from many others in the accounting profession. By then, I had thankfully found my way into technology and public speaking as a career. That's when I was able to **leverage the skills and knowledge I already had** in new ways. ([Contact me](#) if you would like to take a DISC Assessment.)

If you are unhappy in your work, you don't have to throw all of that training and experience away! With the right training, tools, and support, you can use those skills, those insights and knowledge in a slightly different way. You don't have to leap off a cliff like I did. I've got tools that can help you. You will have support and gain confidence. You are not alone. I have a roadmap that will help you create the practice of your dreams.

So, what's holding you back?

Take the leap and make magic happen, y'all!

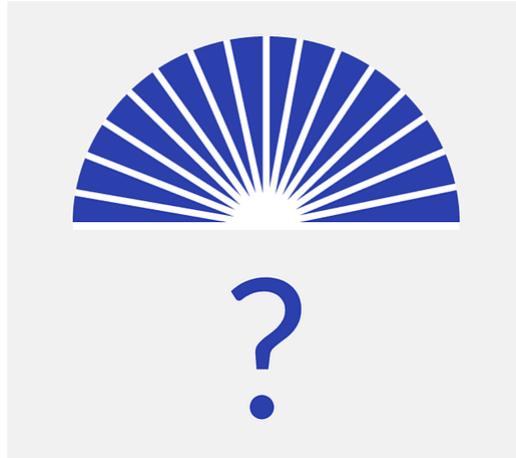
Geni



**Will this be the year you finally change your business for the better?**

There's still time to get the training you need to change the way you work and to make a bigger impact for your clients. Sign up for my [individual or group training](#) now. I have options for one final [group cohort](#) in 2022 that will start in November.

What are you waiting for?



## Question of the month:

### Advisory Question for Your Client:

*"What do you value most in work and life? What would your teams say they value?"*

**Your Answer:** *"Maybe it's time to review your organization's core values. As a level 5 certified advisor, I can help conduct a team exercise."*

*-- from How to Facilitate a Core Values Exercise, Level 5 training*



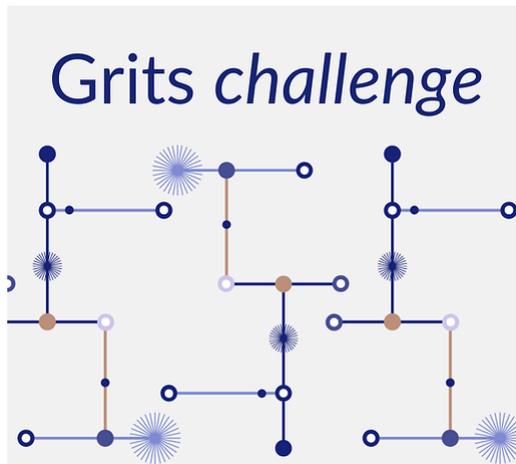
## Upcoming speaking events:

8/31 Online: [How to Fall in Love with Your Firm, Again - Panel Discussion](#)

9/15 Online: [Why Advisory?](#)

9/21 Online: LinkedIn Live w/ Geni Whitehouse & Special Guest

12/7-12/9 LIVE! I'm speaking at [QB Connect](#) again!



## Grits for Breakfast!

Mark your calendars y'all!

**September 2nd is**

**National Grits for Breakfast Day!**

Whether you like them sweet or savory, or maybe you've never tried them, do yourself a favor and start your day off with a bowl in celebration!

A promotional poster for a "Practice Excellence" event. The background is orange with a faint pattern of red and white geometric shapes. The text reads: "PRACTICE EXCELLENCE With Alison Ball", "12:00 - 1:00 PM EST, Wednesday, August 31", and "How to Fall in Love with Your Firm, Again". Below the text are four circular headshots of women, each with their name and a short bio: Alison Ball (Liscio), Dawn Brolin (Powerful Accounting), Geni Whitehouse (Even a Nerd Can Be Heard), and Kelly Gonsalves (Totally Booked).

## Practice Excellence This Wednesday!

Go to AccountingWEB and join us for this The headline and subheader tells us what you're [offering](#), and the form header closes the deal. Over here you can explain why your offer is so great it's worth filling out a form for. Remember

## Making An Impact

***What a pleasure to talk with David Prewitt, CPA  
and Senior Manager at [Baldwin CPAs](#) about his  
experiences in public accounting!***

Catch the recording here:  
LinkedIn Live with Geni Whitehouse  
[Advisory In Real Life with David Prewitt](#)



The Impactful Advisor, PO Box 476, Napa, CA 94559, [www.theimpactfuladvisor.com](http://www.theimpactfuladvisor.com)

[Unsubscribe](#) [Manage preferences](#)