

LEAVE YOUR MARK.

# THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



## **An update from Geni**

Dear Friends,,

It's my birthday month! Cheers to you if this is your month as well.

I am celebrating the chance I had to turn my focus inward for eleven days. I just returned from a retreat in Colombia, South America lead by inspiring botanists and healers from the Amazon. They shared their blessings and insights and offered hope that together we can bring more love into this world. While this was my second annual trip to this amazing place, it felt like returning home.

I hope that you are able to find the space to focus on yourself in whatever manner feels right for you. Just know that the more work we do on *ourselves*, the more energy we have to serve others. Please take care of yourself and know that you are doing great work.

I really believe the work we do is a gift of service. By helping businesses succeed, we keep businesses afloat, which gets workers paid, which ultimately helps families of all kinds put food on the table. Take the time to appreciate the work you do, the skills that you offer your clients, and the heart and soul that goes into the wonderful work that you do each day. And if you are called to deliver advisory services, find a tool, system, or approach that works for you.

I celebrate you!

Here's to finding the magic within,

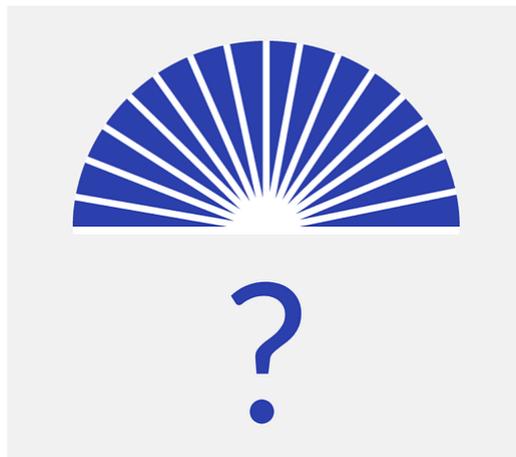
Geni



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## Question of the month:

***Ask your client: "if you could magically solve one problem in your business, what would it be? "***

Be prepared to ask them additional questions. Find out if they think others in their business would have the same answer.

This is an ideal opportunity to schedule a review of their business with the owner and key leaders. We would use the **\$COPE analysis worksheet** (a Level 3 Tool also known as the \$COPE grid) as the basis for that meeting.



## Upcoming speaking events:

9/27 Online: [LinkedIn Live with Geni Whitehouse: Advisory in Real Life with special guest, Michele Maybaum](#)

10/5 Online: [Why Advisory?](#)

10/18 Online: [On the Edge with Botkeeper](#)

10/21 Online: [Bottles, Brews & Buds Webcast Conference](#)

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



## Grits, Colombian Style

While they don't serve grits in the traditional fashion in Colombia, I was thrilled to discover a corn meal - based breakfast option called [arepas](#). These are basically corn meal pancakes (or as I prefer to think of them, fried grits!). They are a staple of the Colombian diet which made my breakfasts during my stay there a real treat.

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# Making An Impact

Who is making an impact this month? I would love to highlight [Alison Ball](#) of [Liscio](#), [Dawn Brolin](#) of [Powerful Accounting](#), and [Kelly Gonsalves](#) of [Totally Booked](#) who I had the pleasure of chatting it up with on the 3rd episode of ***Practice Excellence with Alison Ball*** via AccountingWEB Live. If you missed our conversation access it below by registering for free.

Here's the registration page:

[How to fall in love with your firm, again | AccountingWEB](#)



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