

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



An update from Geni

Dear Friends,,

If you do taxes, you probably aren't reading this in October. You are too tired and your eyes are still crossed. Or even better, you are off vacationing in some amazing spot and aren't checking your email. I hope it's the latter.

Visualize this...

Whether you do taxes or not, here's hoping the work you do for your clients is all treat and no trick - that your clients and team members appreciate the work you do and the insights you provide. I hope you have found a way to apply your unique talents in a way that brings you joy. **If not**, now is the time to really think about what you want. I'd suggest you take it a step further and **visualize** how you would feel each day when you show up for work. Get a clear vision of what you are doing and how it feels. Here's a book that might help you [visualize your goals](#) (*I didn't think I was good at visualizing things - put it in a spreadsheet, why don't you?*) and then make them happen. (These tools are what allowed me to launch The Impactful Advisor business in the middle of Covid.)

Want to be a speaker? New individual coaching service

I have just launched a **new service** based on requests I regularly receive from people who hear me speak. They come up to me at conferences and say they want to become a speaker themselves. As a former TEDx speaker and then speaker

coach, I have plenty of tools I can use. I am now offering [individual coaching](#) via a 12 month subscription. This **individual coaching** with me will automatically include a license to the Level 5 Advisory training along with support for including these tools in your practice.

Live your best life

As always, if you want to change your experience, find something that resonates with you and then do it. Don't let another year go by. It took me 15 long years to realize I needed to stop preparing taxes - and that's when I found my way to speaking. If you are happily living the dream, then by all means, do more of that.

Here's to living your best life,

Geni



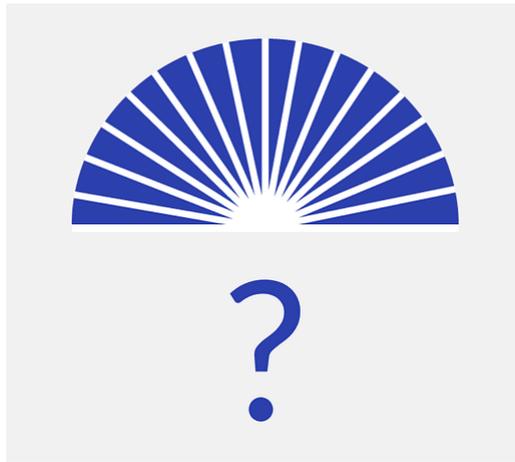
Attention Bookkeepers and other non-tax types! Share your thoughts.

I would love your input! I am considering a February group training aka [Cohort](#) launch in 2023 but would love to navigate based on time of year and interest level of all of you.

Let me know how I can make group training work for you. Access the survey [here](#).

I appreciate your input in advance!

I will also start a [cohort in May 2023](#) for the rest of you.



Question of the month:

Are your clients prepared for a potential recession? Do they have the tools, insights and education they need to make quick decisions?

Now is the time to offer them help. Use one tool from the Level 5 Training and make a difference.



Upcoming speaking events:

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

10/31 Online: [Why Advisory?](#)

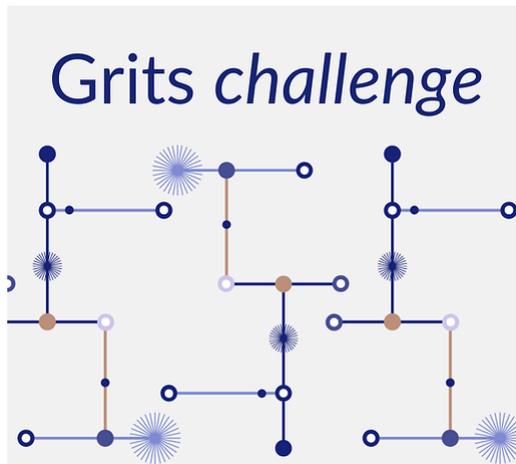
11/2 Online: [Why Advisory?](#)

11/3 Online: Making Space for Advisory - [Botkeeper](#)

11/11 Online: [Why Advisory?](#)

12/7-12/9 LIVE! [QB Connect 2022](#)

2/18 Online: [GaragisteCon 2023](#)



Grits as Muse?

If you have ever heard me speak, you probably know that I like grits (not polenta.) I talk about them and often use them in my presentations along with my beloved basset hounds. When I came across this grits picture, I was inspired to use it in the presentation I am working on for [QB Connect 2022, coming live from Vegas in December!](#)

Check out the image of congealed grits. For a grits lover like me, day-old grits have **no value**. They're nasty.

That's what old financial statements are like - congealed data. Owners want timely info - NOT day-old news.

So, serve 'em up hot, y'all.

Find the full story on congealed grits from the [Daily Dot](#). I chose not to directly link it here for you, due to its offensive language. The article itself was not my inspiration. ***The grits were my muse!***



@rowarb/TikTok

'How the ~~h~~ you get a slice of grits': TikToker shows congealed grits she received from Cracker Barrel

Some viewers gave her tips on how to enjoy the side.

Making An Impact

Talk about impact! Check out this [chat](#) I had with [Jennifer Todd, CPA](#) who transitioned her entire [firm](#) based on her [Level 5 Training](#).

*In order to watch the chat via LinkedIn Live, log-in to your LinkedIn account. You may also find the conversation under my LinkedIn Profile, Geni (Greer) Whitehouse (@evenanerd) under my events, **Advisory in Real Life with Jennifer Todd***



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