

THE IMPACTFUL ADVISOR



An update
from Geni



Would you rather be a "Trusted Accounting Technician" or an "Impactful Advisor?"

This month's thoughts are all about questions. That's, after all, the heart of the Level 5 methodology that I use and teach. **Our job as advisors is to ask different questions.** Hence the big one I ask above. Who do you want to be?

And here's another big question for you. **WHY?** Why did you become an accountant?

I believe that like me, **you care a great deal** about making a difference for your clients. Covid made that very clear. You couldn't stand to see your clients suffer, risk losing their business, layoff employees.

You stepped up and learned, offered opinions when you didn't have full information, and took risks like never before.

And you helped!

Big time.

You stopped being a "Trusted Accounting Technician*" focused mainly on compliance during COVID.

And I am willing to bet your clients noticed. The good ones thanked you. Or called you with nit picky questions about this form or that, and which direction they

should go. They asked for your advice. And you offered it. Even when you didn't have all of the answers. You made an impact.

So what do you do now? Go back to showing up once a year, reconciling, documenting, and accounting for history? I think it's time to make a difference for your clients all year, BUT you need tools you can rely on. That's why I'm launching this new venture. To make these tools accessible and available to more accountants.

The tools are [here](#). I am here to offer as much or as little support as you need in working through the training. *And don't let money be a barrier. Talk to me.*

Your clients are waiting. **Are you ready to make an impact?**

Geni

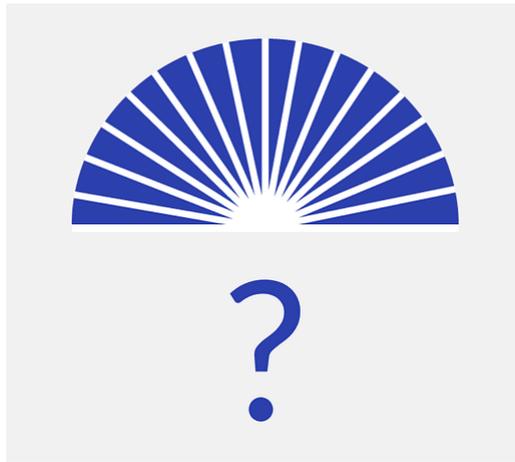
* Part of the training you will receive in the [materials](#) will explain this idea in greater depth.



Sizzling Summer Sale

Summer is here and the heat is rising! What are you waiting for? There is no better time than the present to start your online advisory training. How about a Sizzling Summer Special of 5% off [all program levels](#) using the code [SUMMERSALE](#) through **June 30th**.

Take your firm to the next level with The Impactful Advisor *contact **Malik Castleberry** for more info : clientcare@theimpactfuladvisor.com*



Question of the month

"Is it a people or process issue?"

Next time a business owner complains about an employee, or wishes his team could act or behave differently, or complains about not being able to go on vacation because no one will step up, ask her that one question. ... [more](#)



Upcoming speaking events

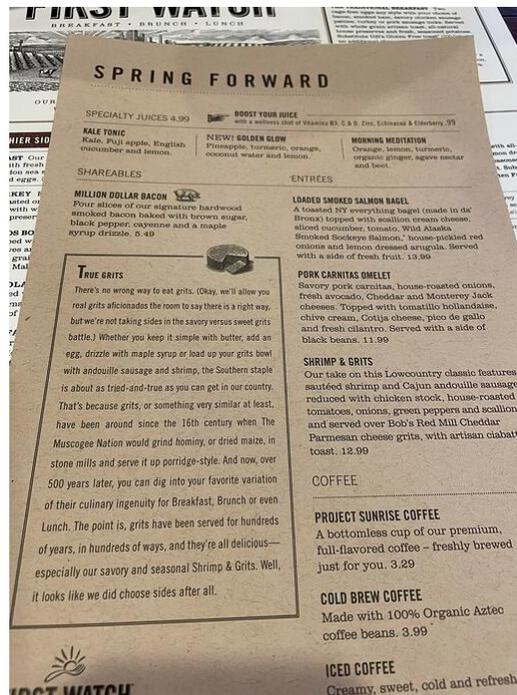
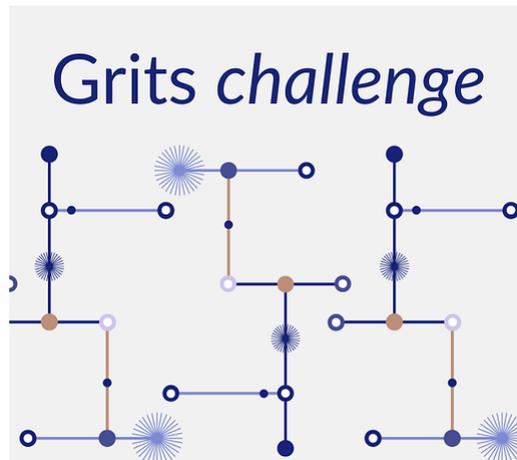
June 24th: CPA Academy Webinar: [How Do I Get My Clients To Pay For Advisory Services?](#)

June 30th: Enhancing the Accountant Bookkeeper Connection - with Tanya Hilts!

Aug 5th-6th: [Bottles, Brews, and Buds Conference](#)

Aug 19th: CPA Academy Webinar: [The Business of Construction: Laying The Foundation For Entrepreneurial Success](#)

Nov 3rd-5th: [AICPA's Women's Global Leadership Summit](#)



"True Grits" in Arizona - "Big Grit" by Keap

Check out this menu from an Arizona restaurant- with a section titled "True Grits!" I love the history they provide to their customers and wanted to share it with you (see top right photo above). It reads:

"There's no wrong way to eat grits. (Okay, we'll allow you real grits aficionados in the room to say there is a right way, but we're not taking sides in the savory versus sweet grits battle.) Whether you keep it simple with butter, add an egg, drizzle with maple syrup or load up your grits bowl with andouille sausage and shrimp, the Southern staple is about as tried-and-true as you can get in our country. That's because grits, or something very similar at least, have been around since the 16th century when The Muscogee Nation would grind hominy, or dried maize, in stone mills and serve it up porridge-style. And now, over 500 years later, you can dig into your favorite variation of their culinary ingenuity for Breakfast, Brunch or even Lunch. The point is, grits have been served for hundreds of years, in hundreds of ways, and they're all delicious—especially our savory and seasonal Shrimp & Grits. Well, it looks like we did choose sides after all.*

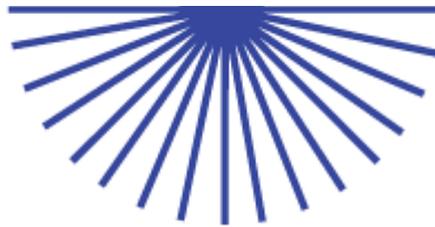
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via www.firstwatch.com

*The correct way is savory. -- Geni

Speaking of grit...

Check out KEAP presenting inspiring, entrepreneurial stories of [Big Grit](#)



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