

THE IMPACTFUL ADVISOR



An update
from Geni



July in August Edition, Uncertainty Ahead

Dear friends,

Well I don't know about you, but somehow July went by too quickly. How can it be time for school to start so soon? And that means Halloween is almost here followed immediately by the holidays. I am feeling behind on my shopping already...sigh.

But this is our window of opportunity to consider new ways of working, to adopt new tools and systems, and to reconsider how we will wind up the calendar year in our own firms. How can we improve our roles and our service delivery? How can we deliver more value and change the focus from hours of effort?

With the Covid situation still unresolved and scary new strains cropping up, we are still facing a great deal of uncertainty. **And so are our clients.**

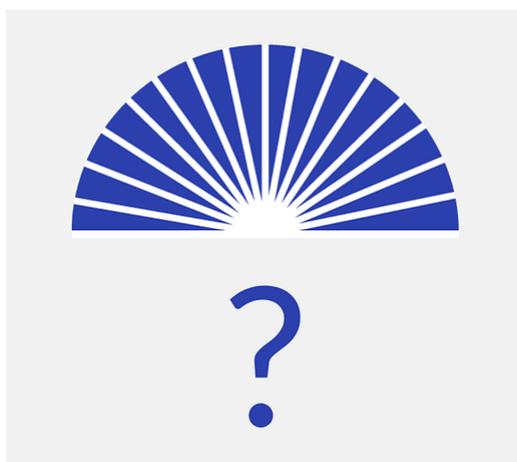
There is no better opportunity for us to *apply our advisor skills* than *right now*. Here are some ideas to apply:

- Help your clients reset their plans using the Level 1 \$COPE as a conversation starter.
- Ask them about their reporting needs and walk through their chart of accounts.
- Pull up Fathom and do a cash flow Goalseek exercise on a demo company.
- Schedule a webinar on Financial Fluency for their teams.

And that's just the tip of the iceberg when it comes to opportunity.

If you are ready to help your clients achieve their business goals, consider advisory certification with our [Level 5](#) program. I have my final 2021 public cohort starting in August - [contact me](#) if you are interested in being a part of my assisted, coached learning as a member of a small group.

Stay well and keep doing great work on behalf of your clients,
Geni



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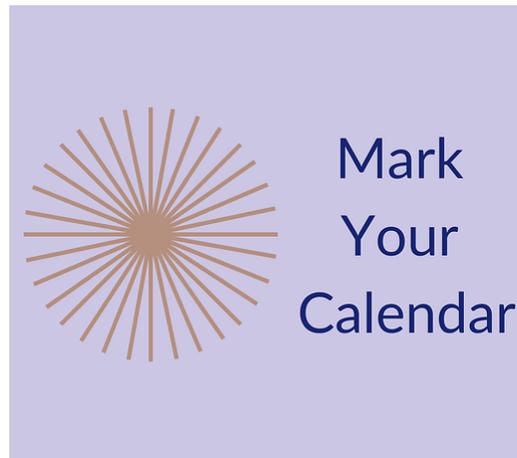
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Question of the month

Ask your client:

- What members of your leadership team speak the language of business?
- Do they understand their connection to financial and operational results? If so, do front line workers?



Upcoming speaking events:

8/3: [Combating Common Time Wasters In Your Accounting Firm](#)

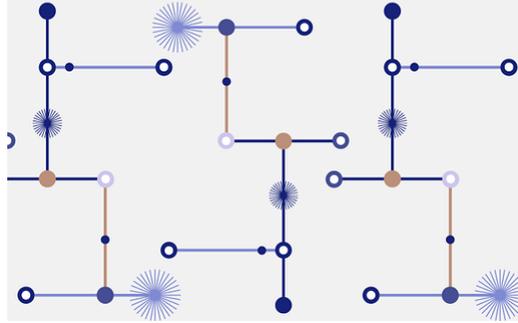
8/5-8/6: [Bottles, Brews, and Buds Conference](#)

8/9: [Stop Hounding Your Clients: There Is A Better Way](#)

8/19: [The Business of Construction: Laying the Foundation for Entrepreneurial Success](#)

11/3-11/5: [AICPA's Women's Global Leadership Summit](#)

Grits challenge



Grits or Polenta?

Grits are a recurring theme in my life. Hence my website

www.polentaunderglass.com.

What started as a theme in 2009 about how absurd it was for people in California to charge a fortune for grits, transitioned in 2019 into a key note presentation. My message was about elevating our value just like the [Napa Valley chef](#) did with his polenta under glass. Why should we market ourselves as the low priced instant grits (which are virtually inedible) when we can become highly prized advisors - like polenta under glass. Don't compete over price, share your story and offer real value to your clients.



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