

# THE IMPACTFUL ADVISOR



An update  
from Geni



## Why you should KONDO your clients

Dear friends,

One of the main hurdles to offering advisory services is often the lack of capacity. I hear from accountants on a regular basis, who lament the fact that they have more work than they can handle, and while they would like to offer advisory services, they just can't find the time to do so. *They are so busy doing low value work, they can't offer high value service. And they are tired.*

My question for you is - how much clutter is in your client list? Does every client bring you JOY?

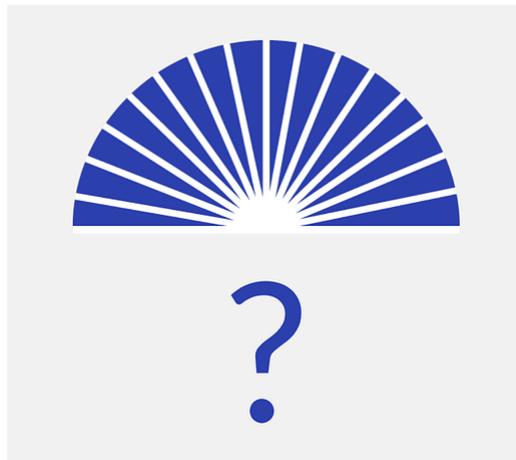
[Click here to read the full blog post](#) and to make the connection between my recent housing move and your client list.

Keep making a difference for your clients and all of the people they represent,

Geni



Accredited  
Impactful  
Advisor  
LEVEL 5



## Are you following?

*Follow, Share, Like*

The Impactful Advisor is Social! Follow me on these Social Media platforms:

**Facebook:** [@ImpactfulAdvisor](#)

**Instagram:** [@impactfuladvisor](#)

**Twitter:** [@ImpactfulAdvisor](#)

## Question of the month

What brings you joy? Here are some things on my list.

- I love seeing people living their biggest lives.
- Finding automation that improves operations.
- Pivot tables!!



## Upcoming speaking events:

9/2: [Stop Hounding Your Clients: There Is A Better Way](#)

9/3: [Combating Common Time Wasters In Your Accounting Firm](#)

9/10: [Stop Hounding Your Clients: There Is A Better Way](#)

9/14: [Planning Ahead: Optimizing Processes to Drive Maximum Firm Value](#)

9/15: [Combating Common Time Wasters In Your Accounting Firm](#)

9/24: [Stop Hounding Your Clients: There Is A Better Way](#)

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

12/7-12/8: [Accounting & Finance Show USA 2021](#)



## Grits from Grist!

Did you know there is a [Bale Grist Mill State Historic Park](#) in the Napa Valley? This historic (restored and functioning) mill built in 1846 was once where "Napa Valley settlers came to have their grain ground into meal or flour." Grist by definition is the corn (or grain) that is brought to a mill to be ground into flour or meal. Corn or "Maize" *made into grist* is called "Grits" when it is coarse. This piece of history sits on highway 29 in St. Helena. If you are a history buff and a "Foodie", it is worth checking out their live demonstrations in person or taking a [Virtual Tour](#).



The Impactful Advisor, 6514 Washington Street, #3898, Yountville, CA 94599

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