

# THE IMPACTFUL ADVISOR



## An update from Geni



### Common Myths About Advisory

Dear Friends,

Whether you have been through my training or not, I want to ask you a few questions.

#### What is keeping you from:

*changing the way you work with clients?*

*becoming a highly valued partner in your client's business success?*

*billing for the impact you make rather than the number of hours you spend?*

I'm guessing it is one of these commonly held (but erroneous) beliefs:

- *Small business clients won't spend money on advisory services*

**FACT:** Small businesses are desperate for insights, for advice, for automation that helps them do more with less. If you can show them how to improve their financial results they can afford to pay you. Teach them how to fund that small\* additional investment it will take to get you on their team. *\*By small, I mean small in relation to*

*the impact you can make on their business. What's \$10,000 if you can improve cash flow by \$100,000?*

- *Accountants don't make very good advisors*

**FACT:** Accountants have the perfect skills to help their clients build the business of their dreams, but they need to apply those skills in new ways and get training from others (like me). They need detailed guides and “how to’s” that make it easy for them to provide repeatable services across their client base. Anyone who can work with numbers and understand the flow of information through a business can deliver Level 5 Advisory services. There are no training prerequisites to this material.

- *I don't have time to develop a new service line*

**FACT:** You would have time if you stopped serving some of those low paying, highly demanding clients of yours. What if you had 5 really good clients a year? How would your life change?

- *Advisory work is difficult to systematize and leverage*

**FACT:** It would be difficult if you had to create the materials yourself. But we've done the work for you. With more than 100 tools, including 14 hours of videos, you have everything you need all in one Online Training Program. These tools, created by Edi Osborne at MentorPlus, are the very tools I use with winery clients in the Napa Valley. They have been used by firms all over the world, resulting in millions of dollars of additional revenues.

All it takes is a shift in the way you see yourself and the great work that you do. Don't listen to the voices of doubt in your head!

**Start now. Stop pushing that rock up a hill. Your New Year's Resolution for 2022 should be to put yourself FIRST! Put these tools to work in your business.**

*If you are already a graduate or enrolled in one of my training programs, then Thank You! Now is the time to put those tools to work for your clients. Please let us know how it is going!*

If you haven't signed up yet, you can still receive a discount on any of my [Level 5 training models](#) through the 12/31 with discount code **YE2021**, see below for details.

Make 2022 your best year yet and drink some good wine,  
Geni



## Discount Code YE2021 Expires 12/31!

If you are considering offering your clients advisory services, now is the time! Take advantage of reduced pricing on [any of my training models](#) before the year ends and this deal is gone for good:

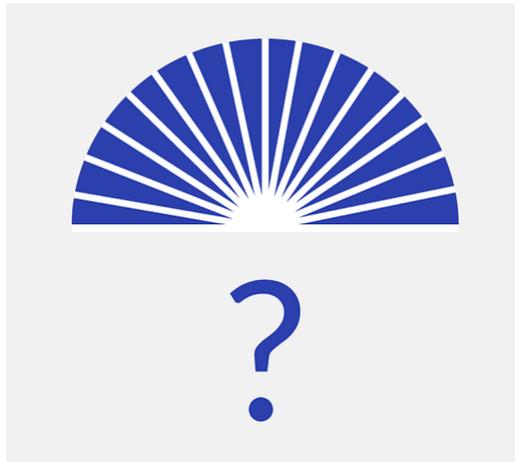
**DIY Program** ~~\$1,740~~ for **\$1,496**

**DIY+ Program** ~~\$2,500~~ for **\$2,150**

**Group Learning** ~~\$6,000~~ for **\$5,160**

**New financing options also available!**

Use discount code: **YE2021**



## Question of the month:

How does your company keep score?

Most companies keep score with this equation "**Revenue-Expenses = Net Profit**".

Level 5 Advisors use a different equation "**People x Process = Profit**".

We have an entire presentation built around this question.

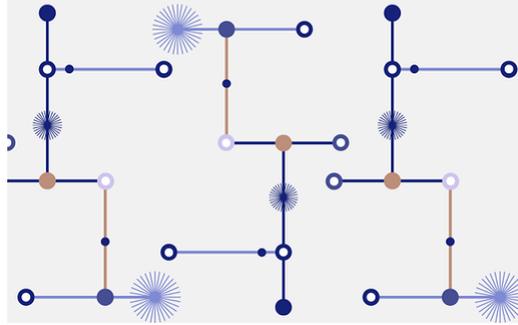


## Upcoming speaking events:

1/4: Online [Quickbooks Online: Measurable Improvements](#)

1/5: Online [Get Your Shift Together In Your Accounting Firm](#)

# Grits challenge



## Should I Share My Super Secret Grits Recipe?

Yes, I have a Super Secret Grits recipe! You didn't think this comfort food lovin', southern girl didn't have a favorite recipe of her own, did you?

I mean, if I share it with y'all, it's really not a "secret" anymore...so the question is, should I share the recipe? [Click here to vote!](#)

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