

# THE IMPACTFUL ADVISOR



## An update from Geni



### Opportunities Ahead - Celebrate Your Successes

Dear Friends,

Happy Already-Busy-PreTaxSeason-Month and New Year! Whew. Did your January start off with a bang? Mine sure did. It's exciting to have so many great client projects in the work. Lots of new students came on board in December and we have new cohorts (Group Learning with me) in progress, along with new CPA firm projects in play. I have a February cohort that has room for a few more folks, if you are interested in joining us you can sign up [here](#). Our next group after that will likely start in May.

My winery clients are seeking lots of help this month - Covid really made them aware of their system limitations. They need advisory help - with tools, tech, and people **now**. Are your clients feeling the crunch too?

Whether you work with me or not, **January is the best time to start changing the way you work with your clients**. Start asking them different questions. Ask them what they are worrying about and what their goals are for 2022. Then consider

ways you can help them optimize the tools and processes they have in place to better support them on that journey. By broadening your perspective on the work you do, you raise your value in the eyes of your clients. If more money for less work isn't already on your list of New Year's resolutions, **I'll wait while you go and add it to your list.** Ok, now. How are you going to change the way you work to make that happen? Automation can help tremendously but you also need to create more space in your life to consider what you want to do and with what kinds of clients. Do you need to hire help? Do you need to fire clients?

Let's all make 2022 the year that we make time in our lives for the things that matter. Friends, family, good health and fun. ***Let's join my basset hound friend above and put on our party hats and celebrate the fact that we survived last year's insanity and then start changing things for the better.***

Make 2022 your best year yet and drink some good wine or even average wine. If you are pairing your wine with grits, it really doesn't matter.

Cheers to you either way!

Geni



## New Year, New Goals

If you are considering offering your clients advisory services, don't put off the [Level 5 Online Training Program](#) any longer. Yes, tax season is officially upon us.

Selecting our [DIY program](#) now, allows you to start and end when it's convenient for you with 12 months of access. Make the goal and invest in yourself now, so that

once tax season is over, you can free yourself from the under-valued, drudgery of compliance work. Your clients will thank you too.



## Question of the month:

**Let's focus on customers.**

Ask **yourself** and **your clients** these questions:

- Why do your customers/clients purchase your products and or services?
- Who are your core customers/clients?
- How often do they refer new customers to you? Do you thank them for those referrals? How?



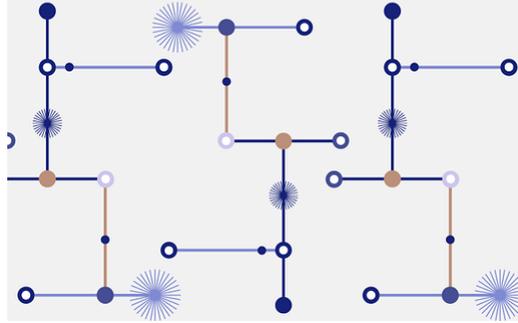
## Upcoming speaking events:

Jan 25, 2022 - 1pm EST/ 10am PST

Join me for my first ever [LinkedIn - Live Presentation](#). I will be having a conversation with the folks at [Veem](#). There will be basset hounds y'all and if I can master the technology, I will do more of these.

Y'all need to come!

# Grits challenge



## Super Secret Grits Recipe

The votes from last month's newsletter are in and there was an overwhelming YES! Thank you to all of those who took the time to have a little fun with me and participate in the vote! [Click Here for my Super Secret Grits Recipe](#) and reach out, [let me know what you think!](#)

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## Making An Impact

*"The Impactful Advisor Program has been one of the best investments I have made! The recorded content, the templates, & the worksheets are powerful! They brought areas of clarity to my business as well as gave me an arsenal of valuable tools for my toolbox.*

*The true secret weapon in this program is Geni Whitehouse herself! Her coaching adds context to the content! She presents dynamic & energetic scenarios and frames of reference to each topic in the program, which helps drive the lesson home!*

*The Impactful Advisor Program has enabled me to make a significant impact on helping my clients reach their business goals!"*

- Coral McGuire

[The Profit Gurus Inc.](#)

