

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Hang in there!

Dear Friends,

I won't bother you right now but just want to send warm wishes and gratitude to everyone who does taxes - I have someone doing mine!! We so appreciate you and hope you have big plans to celebrate after this month's deadline.

Take care of yourself,

Geni



Training Cohort Kickoff - May 8th @ 8:30am

This is the only chance this year to jump in on this [online group training opportunity with me](#). You already have the foundational skills to become an Advisor. I want to take away your fear and give you the confidence to deliver new services.

You will meet online with me and other likeminded accounting professionals as we cover the [Level 5 Training](#) Materials in depth with real-life examples and group discussions. We will focus on new tools you can bring to the table and how to introduce, price and market these tools to your clients.

If you have multiple team members you would like to join the cohort, [contact me](#) for a group rate.

Sign me up



Question of the month:

What has been your craziest client interaction this tax season?

It's ok, you're in a safe space. [Send me an email](#), I want to know!

You are allowed to vent your frustrations during this crazy time. It will help relieve some of your stress. But it's important to not stay in that negative space. Vent to get past the anger of it, so that you can (eventually) laugh about it.

Laughing is good for your health, here is why: [Laughter is the Best Medicine - HelpGuide.org](#).



Upcoming speaking events:

5/7 Online: I Talk Tech - hosted by Geni Whitehouse with special guests Kane Polakoff and Irfan Dossani

9/25 Online: Insightful Accountant Future Forward

Who's next? [What to join me on LinkedIn Live?](#) I host Advisory in Real Life and talk to folks who are making an impact everyday as advisors to their clients.



Winery Grits

As most of you know, I work for a firm in the Napa Valley, [Brotemarkle Davis & CO. LLP](#) and have the pleasure of working with wineries in this area. I received a newsletter from [Robert Sinskey Vineyard](#) that brought a smile to my face. A section of their newsletter celebrates the release of their new [Rosé - Vin Gris](#) by pairing it with...wait for it... *Shrimp & Grits* y'all! That's right! [Here is the recipe](#) ...and be sure to enjoy them with a cold glass of their Vin Gris.

Making an Impact

Have you heard about all of the tools designed to make Tax Season easier? While I don't work in tax any longer, here are a few that I would have loved to apply for my own clients:

- [RCReports.com](#) helps solve the "Reasonable Comp" issue for S Corps.
- [Additive.ai](#) has tools for managing all of those K-1s
- [Corvee.com](#) helps you offer Tax Planning advice.



The Impactful Advisor, 2313 Roberto Street, Napa, CA 94558, www.theimpactfuladvisor.com

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