

LEAVE YOUR MARK.

# THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



## ***It's the Trail You Leave Behind***

Dear Friends,

I want you to think about your own life and what it has taken to get where you are.

Think about all of the tiny circumstances that had to come together to create the **you** that you are today. And then think about your clients and the work they have done to create a business. Focus on all of the good things they have done (even if you can't get them to code their expenses or send you the info you need to finish their tax return). We are wired to spot the negatives, the problems, the mis-coded transaction. Maybe it's time we shift our focus to the things they have done right.

Check out the [LinkedIn article](#) I just posted on this subject.

And remember accounting for history is a necessary first step, but there is so much more that we can do to improve the future for ourselves and our clients. Try reaching out to congratulate a client for something they have done well.

And then reflect and rejoice on the **you** that you are.

I join you in celebrating you,

Geni



## Taxed Out?

Ready for a deep dive into advisory services? [My next and only annual cohort starts in May](#) and offers two live group sessions each month for six months. That's a total of 12, 1.5-hour classes working through the online training.

We will work through all of the materials up to Level 3 together and your year-long subscription to the [full online training](#) will take you through Level 4 and 5 and

graduation!



## **Question of the month:**

What one person or event has had the most positive impact on your life so far?

How did it change you for the better?



## Upcoming speaking events:

**3/25 Online:** Tool Time 2.0

*\*Available to current Level 5 Students & Graduates only, [sign up here](#)*

**4/2 Online:** [I Talk Tech - Platinum Series with Special Guest Danielle Supkis Cheek of Caseware](#)

**4/8 Online:** [I Talk Tech with Geni Whitehouse & Tom Koehler of Intapp](#)

**5/6 Live:** [GrowCon 2025](#)

**6/25 Live:** [Scaling New Heights - I'm back to speak y'all!](#)



## Listen Up

Are you feeling anxious? I am reading a great book by **Martha Beck** called ["Beyond Anxiety"](#) in which she shares tips on dealing with generalized (related to the state of the world) and specific (related to your own challenges) anxiety.

*She also has a podcast called [BeWILDered](#) and the latest episode is called "Your Money or Your Life". Check it out; <https://marthabeck.com/episodes/your-money-or-your-life/>*



## Funny Grits

If you look hard enough (or happen to be obsessed with them like I am) you will find that grits are everywhere - check out my favorite comedian, Jim Gaffigan's take on this southern delicacy.

[I wanna like grits, I really do. | Jim Gaffigan](#)



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**GENI  
WHITEHOUSE**

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I'll be speaking at this year's [GrowCon 2025](#), happening **May 5th-7th**. Come on out to Provo, Utah and join me! My session, **"Accounting Beyond the Numbers,"** is focused on helping you to expand your role beyond traditional accounting, build stronger client relationships, and create a firm that delivers lasting value and impact.

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As my guest, you'll get **\$250 off** your ticket! Use code **GW-250** for a Standard Ticket or **GWVIP-250** for a VIP Ticket when you register.  
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I can't wait to see you there! [REGISTER HERE](#)

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