

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Knowing When Not to Take the Client

Dear Friends,

You know that moment...you're sitting across from a frazzled new prospective client, AI recorder chirping, your brain already mapping out potential next steps—and in the back of your mind, you're worried about pricing the engagement. The numbers don't add up. The owner is overwhelmed and looking for a change. And it's tax season.

You really want to make it better for them. Sometimes that empathy can tug hard. You remember what it's like to struggle. You want to help. But then there's that gut whisper: *"This might not be the right fit - for them or us."*

That was me, recently. A small business owner in the wine industry reached out for help costing her products. On the surface? Seemed like a simple request. But after

conducting a brief review of her information (via a fixed fee, needs analysis engagement) the picture became clearer:

- Her books? Maintained on a tax basis—most inventoriable costs were being expensed.
- Her accounting team? Well-meaning, but not fluent in the unique language of wine.
- Her spreadsheets? Overflowing with re-entered data from PDFs and receipts. She was spending hours tracking things that should have been readily available in QuickBooks.

She didn't need advisory services yet—she needed **structure, cleanup, and a system** before she could benefit from the kind of insight our firm delivers.

As a part-time employee at [BDCo CPA](#), I'm one piece of a bigger client (we call them "customers") experience. Others on our team handle tax and financial statement work. I help with advisory services. So, this decision wasn't just about *me*—it was about whether our firm, as a whole, could be truly effective (and affordable) for this client at this stage.

And the answer?

She needed something else first.

I showed her some things to look for when reviewing QuickBooks Online transactions, told her about attaching invoices to bills (and the AI features that weren't being used by her bookkeeper), and then I referred her to a CAS firm focused on winery bookkeeping (we don't offer these services). That's not failure—**it's impactful advising**. It's knowing that the best help we can offer is sometimes a *connection*, not a proposal. And there is value in that.

Because being impactful doesn't always mean saying yes. By being selective about the clients we serve, we are able to do better work for them. And if we help them with a referral now, they will come back to us when they are ready.

Sometimes, it means sitting like a wise old basset hound at the fork in the road... and choosing **not** to chase every squirrel.

Here's to choosing the path that is right for you and your client,



Group Training Opportunity

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 modules.

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 most importantly **graduation!** [Check out this testimonial.](#)



Question of the month:

Have you ever turned down a client or project that just wasn't the right fit?

What helped you decide—and what happened next?

(Bonus points if a spreadsheet was involved.)



Upcoming speaking events:

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

5/8 Online: [I Talk Tech - Platinum Series with David De Rego and Jeremy Larsen from Acumatica](#)

5/13 Online: I Talk Tech with Geni Whitehouse and John Fleischer Live on LinkedIn

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



Listen Up

You have to love the title of this podcast - "**Energy Stoners Cafe**" that I had the honor of joining back in 2023:

["Numbers Don't Have to Be Scary" host: Toni Quest](#)



Bacon + Grits = ❤️

I've said it many times before (it's even been a previous podcast title) ***bacon goes with everything - especially grits (and quiche).***

So, it shouldn't come as a surprise that I want to make this recipe I found in Southern Living: [Bacon-and-Cheddar Grits Quiche](#)

Hopefully, calories don't count. There's an awful lot of creme in that quiche.



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Agenda now posted for [GrowCon 2025!](#)

The Conference exclusively for owners of Bookkeeping,
Tax & Accounting Companies

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.

I can't wait to see you there! [REGISTER HERE](#)



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