

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Finding the Perfect Match

Dear Friends,

Let's talk about matchmaking. Not the romantic kind. The business kind.

Early in my career in Atlanta, I took every client who said yes. I drove all over the city in terrible traffic, bouncing between industries, personalities, and problems. I wanted to help them all. **I was exhausted.**

I was busy, but I was not focused. My calendar was full, but my tank and my wallet were both empty.

It took me years to realize that building a firm is not about saying yes to everyone. It is about choosing carefully and sometimes about saying no.

Before you define your ideal client, you have to define your ideal firm.

- Are you building the biggest practice in your market?
- The most specialized?
- The firm known for exceptional service?
- Or the one that supports your life and carries you steadily to retirement?
- What does your ideal day look like?
- What do you want your next five years to feel like?

Once all of that is clear, you can ask the better question: What do I value in a client?

For me, *it is curiosity*: Owners who *want* to learn. Who ask questions. Who are willing to try new approaches. Who see technology as a lever to reach their goals.

It is integrity. Clients who care about doing things correctly.

It is leadership: Owners who value their employees. Who train and empower them. Who respect their opinions.

Because numbers do not move themselves. People move them.

Advisory is not something you do to someone. It is something you build with them. If you don't choose your clients on purpose, they will build your firm for you. And you may not like what they build. I learned that the hard way. You don't have to.

Here's to fewer bad dates and more client matches that move your business forward,

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Want to ACE advisory?

Now through the end of February, you can sign up for my [DIY online training course](#) for 10% off using **Discount Code: ACE**.

This offer is inspired by my recent webinar with [ACE Cloud Hosting, Future-Ready Accounting - The Tech Stack that Matters - Watch now on Demand](#).

The Level 5 [training program](#) includes 12-months of access for you to learn at your own pace on your own time. Licensed downloadable documents, spreadsheets, and presentations can be used by you to sit down and begin working with your clients immediately.



Question of the month:

Look at your website. Who do you want to discourage from reaching out for your help?

I purposely try to discourage people who don't have a sense of humor (for obvious reasons).

Also, they must love bassets ❤️



Upcoming Speaking Events

It's tax season y'all - not much going on this time of year!

4/19-21: Live [ITA Spring 2026 Collaborative - Indianapolis, IN](#)



Listen Up

Are you an X-ray technician or a Doctor? Read my latest article sponsored by the amazing payments people at Melio to find out:

[Beyond financial statements: Treating the pain behind the numbers - Melio Payments](#)



Spring Grits

Ok last month I told you what to do with those left-over (some might say gelatinous) grits from the [Pioneer Woman](#).

Now I have one more grits recipe from the Queen of Southern Food. Although I lean in the savory, salty direction, this one sounded like Springtime to me (if Spring came in a hearty, Southern Bowl). And since the weather has been so gloomy (even for California), I just had to try it: [Lemon Blueberry Grits](#)

Making an Impact

We are so lucky to have so many people in our profession making an impact every day. [Check out this list of folks to follow in 2026.](#)



Top 40 Accounting Influencers You Should Follow in (2026)

Ace Cloud Hosting



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