

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



~~The Invisible~~ Weight

Dear Friends,

Summer months are funny. Ask ten people what summer means to them and you will get ten different answers. Wedding season. Extended weekends. Farmer's markets and vacation planning (usually involving a beach). For accountants, it often means mid-year check-ins and the slow realization that the year is half over and the list has not gotten any shorter.

Back in June I had the opportunity to speak again at [Scaling New Heights in Orlando](#), which was wonderful and exhausting in equal measure. The agenda had a great mix of technical sessions and the kind of human-focused conversations that do not show up on a CPE certificate but probably should. I met a single mom juggling three degrees, new certifications, and the quiet weight of trying to be the parent she always wished she had. I talked to another mom managing her daughter's serious medical challenges while keeping up in a demanding job. These were not complaints. They were honest accounts of what it looks like to be a high-achieving person right now.

Some days it feels like being a basset hound chasing its tail. Determined. Focused. Completely going in circles.

We were already running hard. Then AI arrived with the fabulous news that you can do even more now. The promise was always that technology would give us our time back. So far it seems to be filling that "extra" time back up before we can blink.

Here is what struck me in those conversations in Orlando. The invisible weight those women were carrying was not the work itself. It was the gap between the professional they were trying to be and the person they needed to be at the same time. Those two things are always in conflict, and nobody talks about it much.

I have a daughter who recently got married at the beginning of July. I took time off. Like off the grid, off. And I will tell you that deciding to do that *without* guilt (or my laptop in tow) takes practice. Much more than I expected. That's pretty sad, considering how long I have been talking to accountants and advisors about building a practice that works for your life, not just the other way around.

The question worth answering is a simple one: Are you advising your clients toward a life you are not living yourself?

Advisory work at its best creates space. Space for your clients to breathe, to plan, to make decisions from a position of clarity rather than crisis. The advisor in that equation needs some of that space too. Mid-year (Summer) is a good moment to ask honestly whether you have any.

Have a great rest of your summer and take a lesson from the basset hound. Put the weight down. Take a nap. It will still be there when you get back,

Geni



Advisory Training

The Impactful Advisory Training **IS A ROADMAP!** It is a step-by-step, standardized, approachable method of "this is what you do with a client." You can take out the guess work and confidently provide advisory services to your clients

[Find Out More](#)

video courtesy of my interview on Canopy's Practice Success Podcast



Question of the month:

*It bears repeating: **Are you helping your clients move the needle forward in the direction of a dream you can't create for yourself?***



Upcoming Speaking Events

7/26: [ITL 2026 Summer Meeting Information Technology Alliance](#)

7/28-30: Live [Women in Public Power Conference 2026 - Santa Rosa, CA](#)



Listen Up

Check out the conversation I had with [Donna Reade](#) and [Debbie Kilsheimer](#). Two amazing rock stars, keynote presenters, and AI heroes here: [🔴 Bookkeepers On Fire | Live with Geni Whitehouse](#)

P.S. No basset hounds (or bookkeepers) were harmed in the making of this fire.



🚫 Grits

In consideration of my daughter's recent nuptials, I have to say, she would have *absolutely died* if I did number two on this list of what **not** to do with grits!

[6 things you should never ever do with grits](#)

Don't worry, we stuck with rice.

[Melio](#) sponsored me to present a session at [Scaling New Heights](#)! I enjoyed interacting with the folks in the room and was thrilled to share the stage with the amazing [Jarrek Babb](#) on their team who walked us through a great demo.



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