

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



A Familiar Feeling

Dear Friends,

As part of the research for a blog post I am writing for a client, I came across an [article in the Wall Street Journal](#). It talks about the challenge we have as a profession of numbers people in keeping and retaining staff. The article shares stories from accountants who talk about the drudgery, the lack of work life balance, and how we are undervalued.

This breaks my heart ❤️

This is how I felt all of those years ago, the day I finally made it to partner, when I realized what that commitment would mean to me and my family. As I looked around the office in our local Atlanta CPA firm, I saw other talented partners who worked all the time. I saw a future filled with tax returns being worked on 'til midnight, last minute phone calls to clients who owed money they didn't have to pay taxes, and businesses in need of help who never called me. And I left. I resigned the next day. I left to find ways to make life better for me and other accountants and for our clients who weren't getting the help they needed.

I first looked to technology to make things better. I quickly realized that wasn't the answer. We needed to be able to *apply* technology in service to our clients, to help make sense of their data, and harness it in making better business decisions. We needed to learn *new ways* of working with clients.

That's what led me on a search for a [program and methodology](#) I could learn and share. That's when I found [MentorPlus and the Level 5 Advisory Training Program](#) that I use with my own clients and teach today. I know I am making an impact every day.

Here's what one accountant (a 28-year-old from Florida, named Zach Madel) said in that Wall Street Journal article:

"... the work is often tedious, and he doesn't feel as if he's making a difference in his clients' lives. 'We're there to help people, we're there to make scary things like taxation better, and I feel like that's not the message a lot of people view us as giving,' Madel continued to say, '**I think it's somewhat rare that you can say your CPA changed your life.**'"

My message to Zach and to all of you is this: **It doesn't have to be rare for a numbers person (CPA, EA, Bookkeeper) to change a life. You all are changing lives every single day!**

Keep it up y'all,

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The full Wall Street Journal article is [here](#).



100 Impactful Advisors

Since the initial launch of [The Impactful Advisor](#) during Covid in May of 2021, we have reached a milestone that makes my heart sing: **100 Impactful Advisors Trainees!**

I want to thank ALL of my hardworking trainees and graduates who signed up, showed up and made the decision to [make the shift from compliance to reliance!](#) I am so proud of you and the huge impact that you make every day in the lives of your small business clients.

In honor of this milestone, I am offering **\$100 off each monthly payment** of either the [DIY](#) or [DIY+](#) training programs. **Enter discount code TOP100** at checkout and receive \$300-\$400 off of your training.



Question of the month:

For you to consider: In what ways have you changed a client's life?

Just think about the things you have done through your work with clients. How many jobs did you help them with keep during Covid? How many loans did you help a client qualify for? What other impact have you had? Keep that in mind when you bring on your next client and start pricing your services accordingly.



Upcoming speaking events:

10/23 Online: Tool Time 2.0

*Available to current Level 5 Students & Graduates only, [requires subscription](#).

10/25-10/27 Live: [Thriveal-Deeper Weekend](#)

11/5 - 11/7 Live: [ITA Fall Collaborative 2023](#)

11/13 - 11/15 Live: [QB Connect 2023](#)

12/3 - 12/6 Live: [Digital CPA Conference 2023](#)



Listen Up!

Last month I had the honor of joining [Jasen Stine](#) and [David Bergstein](#) on the [AccounTrends Podcast presented by Intuit Accountants](#). In the episode we talked about how it's not just about crunching numbers but providing insights and guidance to our clients to improve their financial health and business outcomes. It takes a trained advisor to help clients define clear objectives and then using financial data and analysis to support those objectives using an "end in mind" approach.

Take a listen to the full podcast: [Unlocking the Secrets of Impactful Advisory Services](#)



Poetic Grits

I cannot wait to be in Greenville, South Carolina next week to attend [Thriveal's Deeper Weekend](#) and enjoy my favorite southern comfort food made the *right way*. I may be reciting this poem the whole plane ride there: [Gimme Some Grits - A poem by Frances Dingman](#)

Making an Impact

Accounting Salon's [Amanda Aguillard](#) & [David Leary](#) are offering a free [six-part speaker series](#) that will run **October 31 - November 2**. They have a true ★ all-star ★ lineup speaking on relevant topics to our industry! You will NOT want to miss this series. Check it out:

[Content Creation for Accountants with Lorilyn Wilson](#)

[Using ChatGPT in Your Firm with Brian Clare and Heather Smith](#)

[Empowering Your Clients to Trust Technology with Tate Henshaw](#)

[Growing Intentionally - A 4-Step Approach to Unlocking Sustainable Growth with Keila Hill-Trawick](#)

[Unlocking Accounting Mysteries to Empower Your Clients with Twyla Verhelst](#)

[Disengaging with Grace and Ease with Sherrell Martin](#)



**ACCOUNTING SALON
SPEAKER SERIES**

Join industry leaders for a free, CPE-qualified series on important practice management topics.

OCTOBER 31 - NOVEMBER 2



A row of seven circular headshots of the speakers, arranged from left to right: a woman with braids, a woman with long blonde hair, a man with a beard, a woman with short dark hair, a woman with long blonde hair, a man with a beard, and a woman with short blonde hair.



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