LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.

Standing Out in an AI World

Dear Friends,

"I hope this message finds you well." That's the standard AI generated opener for every email. How many of those are you receiving each day?

Everyone has access to the same AI tools so eventually all communication will become homogenized, with the same sentence structures, grammar, and correct spellings. We'll use big fancy words, when others might do better and we won't have unique voices. And you won't see choppy fragments like this one that my English teacher would hate.

The same will be true for the services we offer. Everyone can run their financial statements through their favorite AI tool for insights. We'll be working from a standard list of suggestions and the same 4 or 5 generic KPIs.

So, what value do we add?

That's where you come in. Your personality, your voice, your ability to listen with that empathetic heart of yours. Your desire to really hear what your clients are struggling with, what they need, what they fear. There is a lot of fear and uncertainty all around us (and not just because of the latest horror film "Good Boy" which isn't about a basset hound). Your ability to walk your client through those critical KPIs, add some unique ones, and help them figure out how to improve the results **is the value**.

But it is also your unique perspective, your experience and curiosity that will set you apart from others. Do you specialize in a particular industry? Then showcase that expertise wherever possible. Live events are becoming popular again. Get yourself on an agenda that puts you in front of your desired audience.

Find ways to show your personality in everything you do. Again, people are getting tired of chat bots and automation. They want a real human. Schedule calls with your clients. Don't mail it in!

Fly your freak flag, y'all. Or wear purple. Whatever floats your boat.

I hope this message finds you full and happy, inspired and curious, ready to wear your favorite costume while eating all of the Halloween candy you had planned to hand out,

Geni

Typos, misspellings, grammatical errors are all generated by me, with the help of Chai.

Free Fathom Tool Time

In November I will be offering a free Tool Time Session featuring Fathom dashboards that I use with my own clients. *(This class is normally only available as part of a 12-month subscription for my DIY+ clients.)*

You will learn how to use Fathom in selling advisory services.

When: Tuesday, November 25th
Time: 10am-11am PST (1:00 pm Eastern)

Register for this free session here!

Question of the month:

Where can you add more human interaction to the services you are providing?

How can you present information in a way that makes it easier for your clients to understand it?

What is unique about your client delivery?

And what is your favorite candy?

Upcoming speaking events:

11/2-4 Live: ITA 2025 Fall Collaborative

12/4 Live: 2025 WINExpo
GET $30 OFF REGISTRATION USING **PROMO CODE: GENI2025

1/12 Live: CPA Societies Executives Association Midwinter Retreat

Listen Up

I joined Michael Palmer, host of The Successful Bookkeeper to talk about how to strengthen client relationships. We discussed strategies as well as practical tools and mindset shifts for bookkeepers looking to step confidently into advisory and stronger client relationships. Here are both episodes of ***The Secret to Making Clients Feel Smart & Seen:***

PART 1 - Episode 484
PART 2 - Episode 485

Polenta in London

While traveling at the end of the summer (and being off the grid which I highly recommend), I was able to find grits even in London, YUM!

Gluten Free Lemon Polenta and Pistachio from The Exploding Bakery.

Making an Impact

Did you hear about the [Advisory Amplified Tour] offered by the creative, passionate, and true trail-blazing advocate for change [Madeline Reeves?]

Talk about making an impact! Madeline and her team gathered some of the biggest names in the accounting industry, partnered with some of the top fintech companies, and managed all aspects of a six-city tour across the nation to bring advisory to the advisors.

I was honored to be the Emcee at the second tour stop in Los Angeles. What an incredible opportunity and great community that showed up - we all left **amplified** and ready to make a difference for our clients.

Still thinking about getting trained in Advisory using the Level 5 Methodology? Then sign up now as prices will increase November 1st.

Here is what our most recent graduate Ugochi Williams had to say:

"The Level 5 Certified Advisor course is the first program I've taken that truly delivered on what it promised. I now feel fully equipped with the tools to support my clients with advisory services confidently. The material is evergreen, and I can clearly see how these tools apply across industries and at every stage of a company's life cycle.

What sets this course apart is that it moved beyond the vague suggestion we often hear, "you should be offering advisory services." Instead, it provided a clear, systematic, and repeatable framework for what that actually looks like in practice.

With this structure in place, the only barrier to success in advisory is allowing other obstacles to get in the way.

After taking courses from others in the past that left me disappointed and no better equipped, I was hesitant to invest in a course again. When I heard Geni speak about this program, I decided to give it one last try. I am so glad that I did. This course is exactly what I had been searching for, and I am forever grateful."
