

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Opening Yourself Up To What's Ahead

Dear Friends,

This newsletter comes as I prepare to return to my hometown of Greenville, South Carolina, to visit relatives and celebrate my mom's 90th birthday! Who would have thought my journey would take me from growing up in South Carolina to living and working in Napa Valley? It was never something I could have predicted or planned.

Looking back, it's funny how life's twists and turns lead to unexpected opportunities and meaningful connections. Sometimes, I had a clear goal, which kept me on paths longer than I should have stayed (like doing taxes). Other times, I took big chances that turned out better than I could have imagined (like working with wineries in the Napa Valley 🍷). One of those leaps was applying for a part-time role with the

[Information Technology Alliance](#), an organization I joined in the early days of my career. Now, I get to work with a fantastic team in the tech world!

A lesson that keeps surfacing for me is the importance of wonder and being open to what's next. We often strive to make things happen, set goals, and cross tasks off our growing lists. While having a vision is valuable, *sometimes we just need to pause, embrace the unknown, and trust that things can unfold in ways better than we ever imagined.*

The Fall season always feels like a fresh start for me. The air is cooling, and pumpkin spice scents fill my home, thanks to my handy electric diffuser. With the post-tax deadline behind us, I encourage you to take a moment to appreciate the season and stay open to what's ahead. Let's also send love to those affected by recent disasters, including those living in the beautiful North Carolina mountains, which were hit hard. If you're inclined, here's a way to contribute to the [NC relief efforts](#).

Through it all, there are helpers and heroes, reminding us of our shared connection.

Here's to health, happiness, and pumpkin spice,

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Spooktacular Special - Free Webinar

Attention Trainees: Join me **at no charge** for our upcoming [Tool Time Webinar](#) scheduled for October 31st starting at 8:30am PST. In these monthly webinars we dive deep into a specific advisory tool or concept in the [Level 5 Training Program](#). In this session, we are going to cover a Consensus Workshop and work through an exercise together. The focus of the exercise will be how to find capacity for advisory services.

[Register for this free webinar here!](#)



Question of the month:

What would you like to stop doing?

Ask yourself first and then ask your clients. You will be amazed at the ways you can find to eliminate the things you don't want to do anymore. Al anyone?



Upcoming speaking events:

10/23-10/25 Live: [Thriveal - Deeper Weekend](#)

10/30 Live: Crossing the CAS'm: Upskilling Your Teams to Add More Value

11/3-11/5 Live: [ITA Fall Collaborative, Indian Wells, CA](#)

12/8-12/11: [Digital CPA](#) (attending only)



Listen Up

I'm always excited to talk about numbers and the wine industry where I have the unbelievable pleasure of working. In this recent podcast with [Peerview Data](#) I talk about navigating the complexities of the wine industry and the importance of moving beyond financial measures for true insights.

Listen to the full episode: [Best Metrics: Wineries](#)

Grits Challenge



The Taste of Grits Bits

Those of you who read this far down into my Newsletter each month may remember my discovery of [Grits Bits](#) back in the [Spring](#). Well, I finally ordered them y'all.

I had intended to order the [variety pack](#) to try multiple flavors but they were sold out. Instead, I ended up ordering a tin of their standard [cheddar grits bits](#). These are labeled "Best Georgia Snack". Given my culinary expertise in the grits department (no credentials necessary) my taste test review of these small cookie shaped

biscuits left me feeling, just ok. They are crunchy and pretty rich in flavor, so I could only have a few at a time. But if I was entertaining guests and was throwing together a charcuterie board (because I can talk fancy like that too), they would be a fun, unique addition.

I might be willing to give it another try with other flavors like their Jalapeño or Sweet Georgia Brownie.

Making an Impact

Here is a good read with some good news coming in the aftermath of Hurricane Helene and proof that there are heroes everywhere:

[USA TODAY: Miracles in the Mud](#)



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