

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Adventures and the Unknown

Dear Friends,

As I get ready for ['Appy Hour Camp](#) next week (which I hope to see many of you there), it brings back a million camping memories. I was a Girl Scout all through high school, and later, a Troop Leader—so weekend camping trips were a big part of my life. *And who doesn't love s'mores??* I still love tent camping and hiking, though I don't get to do it nearly as often as I'd like.

My first overnight camp was in sixth grade—a week-long adventure in the North Carolina mountains, filled with amazing hikes and creek slides. But it didn't start that way. Do you remember that feeling when you first arrive at a new place? You don't know anyone, don't know the expectations, and don't even know where the bathrooms are (biggie)! You worry about everything and just want to run back to the car before your parents leave.

Then it all changes. You make your first connection with someone who's feeling the same way. Maybe they arrived a bit earlier and can show you the ropes, helping you find your bunk and where to stash your things. They even offer to take you to your first meal. Before you know it, you're part of the group. And that's when you can relax and start enjoying the activities.

Fear of the Unknown

That feeling, it's something we all experience, whether in-person or online. You take a step toward a new adventure, and the panic sets in. What should I wear? How should I act? What if I fail? You can hardly breathe.

In that moment, you have a choice. Do you push forward through the fear, or turn and run? In my experience, the only way to grow is to move through the fear and embrace the opportunities on the other side.

Delivering a new kind of service is just like that. It can feel like jumping off a cliff when you start asking your clients different questions. What if you don't have the answers? What if you can't deliver the results? What if you can't get it done? That's where having a [tool kit](#) comes in - like having that helpful guide at camp. You've got a process to follow, connections with others facing similar challenges, and even access to a "camp counselor" if you need one :)

What you eventually realize is that everyone feels afraid at first, but the only way to expand your comfort zone is to keep pushing, trying, and growing. The fear never fully goes away, but your confidence in handling it grows with each new experience. Give it a try!

I hope to see you at a campfire soon! I'll be the one with the marshmallow stuck in my hair.

Here's to s'more grand adventures for us all,
Geni



Got 5 minutes?

Still trying to figure out what "Advisory" means, what it looks like and how to get started? Take five minutes to watch this video where I explain the [Level 5 Methodology](#). You can get trained, certified and utilize these tools with your clients today: [What is Level 5 in 5 minutes — The Impactful Advisor](#)



Question of the month:

Ask your client this about their chart of accounts.

Does the structure of your chart of accounts provide indicators of progress towards goals?

Asking this question raises the possibility that the insights your client needs is not going to come from their general ledger. Yes, it is setup to compare actuals to budget (hopefully) but nowhere does it speak to their overall goals. That information resides elsewhere – probably in their sales system or other operational tool that feeds to the general ledger. Or maybe, it's on some invisible master plan that exists only in the mind of the owner. Bingo – there's an opportunity for you to help them get their plan documented.



Upcoming speaking events:

9/22-9/26 Live: ['Appy Hour Camp](#)

9/24-9/25 Online: [Insightful Accountant Future Forward](#)

10/8 Online: [I TALK Tech with Geni Whitehouse Live on LinkedIn featuring Bryon Wilton of LBMC Technology Solutions](#)

10/8-10/10 Live: [AI Unchained 2024](#)

Registration Discount [Click Here](#)

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



Listen Up

What skills take an advisor from good to great? I believe listening, documenting, and curiosity are the three key skills that will help take any advisor to the next level.

I was grateful to have partnered with LumiQ to discuss how to: [Talk Less, Listen More: The Counterintuitive Art of Advisory](#). I share tips on how you can build trust with your clients through active listening, strategies for documenting client insights, and how to shift your mindset to a growth-oriented one. I hope you'll take a listen.



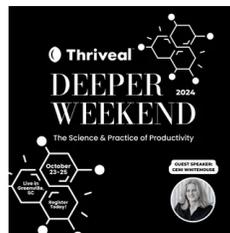
October Grits

In October I will once again be traveling to my hometown of Greenville, South Carolina to participate in [Thriveal's Deeper Weekend](#) and I couldn't be happier! I

attended the event last year and was so impressed by the talented accounting practice owners I met.

I am also excited to indulge in *true* southern grits! [Soby's](#) in Greenville received accolades for [Best Shrimp & Grits by Southern Living Magazine](#) this year, so I might have to pay them a visit!

Don't miss out on these upcoming events!



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