

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Dropping the Ball

Dear Friends,

I missed March 🤖 I also missed April Fool's Day, which would have been the perfect setup for a basset hound joke. Too late now.

But, I have a good excuse. I moved. Not across town, but two hours north of Napa into the foothills of the Sierra Nevada, where the air is clean and the WiFi is a work in progress. I still have the privilege of working remotely with winery clients and am close enough to meet with them in person (and do the requisite quality control wine tastings) when needed. The movers arrived Friday and as I write this, I am sitting in my new home surrounded by boxes, one shoe, and approximately zero regrets.

The other shoe is here somewhere. Probably in the same box as my March newsletter.

Here is what I know about missed deadlines. There are always good reasons. Life is busy. Tax season is real. And that client of mine called me with a crisis. And suddenly, thanks to AI, we have more tools than ever to help us get things done.

Which somehow means we are expected to accomplish 400 times more stuff. We don't. We just feel worse about it.

Here is the real April Fool's joke. We keep thinking the next tool, app, or AI assistant will finally close the gap between what we intend to do and what we actually do.

It won't. You know what does? A conversation. A real one. The kind where you ask a client what they have been meaning to do since January and actually wait for the answer. Then help them push through whatever is in the way.

Because no matter how organized we are, something always goes missing. A shoe. A deadline. A plan.

Your clients feel this every day. Surrounded by data, dashboards, and tools, but still missing the one thing they actually need, a clear sense of where they are headed and whether they are going to make it.

That is where you come in.

April 15th is almost here. On April 16th, put down the packing tape (or the calculator tape if that still even exists) and pick up the phone. Ask your clients what they have been meaning to figure out since January.

I will find my shoe eventually. Some things just take a little longer than planned.

Here's to fewer excuses and greater impact and may all of your 1040's have refunds (but not so big that it looks like you didn't plan well enough... sigh.),

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After tax season

What's next?

The Level 5 [advisory training program](#) includes 12-months of access for you to learn at your own pace on your own time. Licensed downloadable documents, spreadsheets, and presentations can be used by you to sit down and begin working with your clients immediately.



Question of the month:

Other than gathering their tax records, what one thing do your clients put off the most?

How about training their teams, reviewing their budget, checking in on their strategic plan...



Upcoming Speaking Events

4/19-21: Live [ITA Spring 2026 Collaborative - Indianapolis, IN](#)

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



Listen Up

Technology is powerful, but only when it supports a clear strategy. Last month I joined my friends [Zane Stevens](#) and [Seth Fineberg](#) for a panel discussion thanks to [Ace Cloud Hosting](#) on a topic that everyone is trying to figure out: [The Tech Stack That Matters](#)

But before you invest in new systems, layer in AI, or automate another workflow, step back and ask yourself

- What is working in your firm?
- What isn't working?
- What are actually trying to accomplish financially or operationally?

Without that clarity, automation simply accelerates inefficiency.

[Watch the webinar here](#) or download the [Free Ebook from my Resources Page](#) under "The Tech Stack" heading.



Grits

This month's grits reference trades butter for brain science.

If you are curious what grit actually looks like under the hood, this is a quick read worth your time:

[The Science of Grit: What Makes Some People Keep Going?](#)

The short version: grit is not about having it easier. It is about what you do when it is not.

Which feels about right for April. Keep stirrin'.



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