

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Value & Grit

Dear Friends,

I've been thinking a lot about the word *value*.

It's everywhere in our space: value pricing, adding value, core values. But when you pause for a moment and really sit with it, it gets more interesting.

On one hand, value is about the worth of what we do. The outcomes we create. The impact we deliver. It's about pricing based on that impact, not on hours or effort. That's where value pricing comes in. But pricing this way means shifting focus—from what matters to *us* (like a standard chart of accounts for every client) to what matters to *them* (a simplified chart that offers real managerial insight). Only then can we begin to price our work appropriately.

But there's another kind of value. The personal kind. Our values. The beliefs and principles that show up in how we treat clients, how we lead teams, how we navigate tough calls. These aren't always visible, but they're just as important. *(There's an exercise below you can use with your team—it's a great icebreaker.)* Here's the part I keep coming back to: they're connected. The more aligned we are in what we believe and what we deliver, the stronger our work becomes. It gets easier to choose clients, to create content, to hire well. Our values give us a compass. (But why aren't grits on the list of core values?)

So, take a moment. Think about your own core values and how they show up in your workday. How do they shape the value others see in what you do?

I plan to be exercising my core values of friendship, fun, and adventure this holiday weekend.

I value you and hope you take some time to reflect,
Geni



Group Training Opportunity begins 5/27/25

Ready for a deep dive into advisory services? [My next and only annual cohort starts in May](#) and offers two live group sessions each month for six months. That's a total of 12, 1.5-hour classes working through the online training modules. The first class is **Tuesday, May 27th at 11:30 am Pacific** ~ *If you can't make the introductory class, I am happy to get you up to speed individually.*

We will work through all of the materials up to Level 3 together and your year-long subscription to the [full online training](#) will take you through Level 4 and 5 and most importantly **graduation!** [Check out this testimonial.](#)



Question of the month:

What do you value most in life and work?

This is one of the tools in the [Level 5 toolkit](#). You can facilitate a team meeting around this concept.

Have everyone choose their top 5 words from the google sheet [here](#).



Upcoming speaking events:

6/4 Online: [I Talk Tech](#) - Platinum Series with DayShape

6/10 Online: [I Talk Tech with Geni Whitehouse and Dave Wyle, GM of Audit at Thomson Reuters](#)

6/25 Live: [Scaling New Heights](#) - I'm back to speak y'all and I have a surprise for you!



Listen Up

Huge thanks to [Randy Crabtree](#) for recently having me as a guest on *The Unique CPA Podcast* to discuss [Finding Your Passion & Purpose](#).



Rollin' in Grits

This past April marked the 40th Anniversary of [The World Grits Festival](#) in St. George, South Carolina.

This year was the first year since the pandemic that the fan favorite competition event of ***Rollin' in the Grits*** returned. (That's one spa treatment you won't find in Napa Valley!) But enjoy this 9 min video of: [What It's Like to Compete in a Grits Rolling Contest - Atlas Obscura](#)

A dark blue rectangular graphic with white and light blue text and graphics. On the left, the text 'Scaling New Heights' is above a mountain icon, followed by 'MAKE IT SO' in large, stylized letters with horizontal arrows. On the right, it says 'I'm speaking at Scaling New Heights 2025!', 'Keynote - Wednesday Main Stage', 'Orlando, Florida, United States', a circular photo of Geni Whitehouse, and her name 'Geni Whitehouse' below it.

Scaling New Heights

MAKE IT SO

I'm speaking at Scaling New Heights 2025!

Keynote - Wednesday Main Stage

Orlando, Florida, United States

Geni Whitehouse

SCALING NEW HEIGHTS 2025

I can't wait to see you there! [REGISTER HERE](#)

I am so happy to be returning as a speaker at [Scaling New Heights 2025](#) in Orlando, Florida June 22nd-25th. I'll be hitting the mainstage on the last day, Wednesday, June 25th at 9:00am EST to discuss the mindset change required to put your dreams into action.



BONUS, the state of Florida is home to my new favorite non-profit:

[Suncoast Basset Rescue](#)

whose mission is "...to rescue, rehabilitate, and rehome stray, abandoned, shelter & owner surrender basset hounds just for the love of the breed." The breed is just so near and dear to my heart. I couldn't have ever imagined I would establish a connection with the great people of this organization who volunteer their time purely for the same love and affection for these furry friends that I do! Follow them and the adventures of the beautiful #RubyBegonia (pictured above) on [Instagram](#).



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