



**Efficient Practice Founder and President, Dr. David Lawrence, RFC<sup>®</sup>, AIF<sup>®</sup>** has over thirty-six years of experience in leadership. He is a veteran of the U.S. Navy during the Vietnam War, having spent over 4 years on active duty as a non-commissioned

officer and, later as a commissioned officer in the Naval Reserves. His service in two war zones, first in South Vietnam near the end of the Vietnam War and later, in the Middle East, provide a courageous backdrop to his leadership experiences. His compelling story of military leadership during a time of domestic political unrest is truly inspirational.

Dr. Lawrence is a graduate of The University of South Florida in Tampa, with a double undergraduate and Master's degrees (cum laude). He attended the University of Florida in Gainesville for his Doctorate in Social Behaviorism.



David then spent 18 years with a major financial planning firm as a Senior Financial Advisor, Training Manager and District Manager. He has also worked for two large independent financial planning and asset management companies in senior management positions. His responsibilities have included managing large numbers of employees as well as setting up employee hiring, training, evaluation and compensation systems. His background and experience in integrating technological systems with management needs has given him a unique perspective on the use of technology as a leadership tool.

David has spent the past several years writing and speaking. He founded the **Efficient Practice**, a consulting company devoted to growth efficiency solutions for financial services institutions and their reps. His speaking engagements have taken him all across the United States, Canada and the Far East. Conversant in five languages, he is acutely aware of and sensitive to the need for efficient communications in leadership and in life.

David is a current member of the International speaker's Network (ISN). A partial list of David's speaking engagements includes:

- The Financial Advisor Symposium, Chicago, The Financial Advisor Retirement Symposium, Las Vegas
- The Financial Planning Association
- The Securities Industry Association (Now called SIFMA)
- The National Association of Variable Annuities (NAVA)
- The International Association of Registered Financial Consultants (IARFC)
- Society of Financial Service Professionals (SFSP)
- The Financial Professionals Education Expo
- The Laserfiche Institute Conference
- National Advisors Trust Shareholder Conference
- TD Ameritrade Institutional National Conference, Schwab Impact Conference
- Financial Services Institute (FSI), Forbes Magazine – Advisor eConference
- Million Dollar Round table (MDRT) Annual Meeting
- MultiFinancial Connect Conference
- Financial Network Connect Conference
- Technology Tools for Today Conference

He has been frequently quoted by such national publications as Barron's, Financial Planning Interactive, USA Today, and The Wall Street Journal Online among others. He has written articles for Practice Lifecycle, the Investment Management Consultants Association (IMCA) Monitor, The Virtual Office Newsletter and Turning Point Inc. Newsletter. He has also made frequent appearances on NBC and FOX television affiliates. He is a sought after public speaker on a variety of leadership, financial and technical topics. He is a Past President of the Financial Planning Association of Tampa Bay and is active in that organization on a national level as past-chair of the FPA's National Leadership Council. Further, David Lawrence was the Chair of the FPA's 2006 National Leadership Conference. David currently is a monthly columnist and contributing editor for **Financial Advisor Magazine** ([www.fa-mag.com](http://www.fa-mag.com)). He is also co-author with David Drucker and Joel Bruckenstein of **Technology Tools for Today's High-Margin Practice** (Wiley Publishers) and is currently finishing another book for the same publisher entitled **The Efficient Practice: Transform and Optimize Your Financial Practice for Greater Profits and Success**.