

Building a High Profit - High Value Financial Practice: 5 Steps You Must Do

Presented by David L. Lawrence, RFC[®], AIF[®]
Founder and President
EfficientPractice.com
Monthly Columnist and Contributing Editor
Financial Advisor Magazine

Outline of Session (55 minutes)

1. Introduction
 - a. Diagnostics of your practice
 - b. Analyzing Your current situation
2. Building a High Profit Practice
 - a. The five things you must do to succeed
 - b. Communicating change effectively
3. Building value through unique innovation
4. Employing Tipping Point Leadership
5. Maintaining your practice after the fact
6. Creating a New Office Culture
7. Final Thoughts
 - a. Questions
 - b. Comments

Total Time: 55 minutes

Edited: January 14, 2010

CEU approved: None

Speaker: David L. Lawrence

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5 Steps You Must Do**

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Course Purpose/Learning Objectives

With recent economic pressures on firm profits, financial practitioners are struggling to survive in an environment that could yield unbelievable profits and value if there are changes made to how the practice operates. This session focuses on five steps that could fundamentally change how the firm does business. It focuses on how to ramp up profitability and take advantage of current circumstances through unique strategies designed to work now and in the future. This is one session that offers a wealth of ideas that can be used right away with little or no additional expense.

David L. Lawrence, AIF®

David L. Lawrence, AIF®, is President of David Lawrence and Associates, a practice consulting firm based in San Diego, CA. Mr. Lawrence has more than 26 years of experience as a financial planner, consultant, public speaker and writer. He has been recognized by numerous organizations for his efforts, including The Internal Revenue Service, the Housing and Urban Development (HUD) Agencies, The Securities Industry and Financial Markets Association, The Financial Planning Association and the United Way. He is a frequent on-air commentator on financial topics with local Fox and NBC Television affiliates. And, Mr. Lawrence currently writes a monthly column for **Financial Advisor Magazine**.