

Save Your Practice and Your Profits with Technology

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: Evolution of efficiency
2. Efficiency defined
3. The Profit-Driven Financial Practice Architecture
 - a. Four critical areas:
 - Management
 - Technology
 - Process
 - Design
4. Technical Systems Efficiency
5. Some new technologies
 - a. Hardware
 - b. Software
 - c. Operating in the Cloud
6. Remote Advisor tools
7. The Paperless Office Solution
8. Integrated Website Solutions
 - a. Using Microsoft Office as a Power User – Advanced Concepts
9. Final Thoughts
 - a. Questions
 - b. Comments

Total Time: 55 minutes

Edited: January 14, 2010

CEU approved: None

Speaker: David L. Lawrence

Topic: Save Your Practice and Your Profits with Technology

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Course Purpose/Learning Objectives

Many financial planners began as one-person shops and grew into larger, more complex practices. With this growth, efficiency of operations has become a major concern. Competing with larger firms is more difficult with profit margins shrinking and client demands for more services from their advisors.

The session reviews methodologies for improving the efficiency of practice operations through a review of technology and systems that can vastly improve operational efficiency and substantially increase net profit without sacrificing quality. This session contains tons of ideas and suggestions on the use of the latest, cutting-edge technology to supercharge your practice and your profits.

David L. Lawrence, RFC[®], AIF[®]

David L. Lawrence, RFC[®], AIF[®], is President of EfficientPractice.com, 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**.