

Dynamic Leadership and Communication

Presented by David L. Lawrence, RFC[®], AIF[®]
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Financial Advisor Magazine

Outline of Session (55 minutes)

1. Introduction
 - a. The rules of Dynamic communication
 - b. 10 tips for successful communications
2. Communications and the leader's role in the firm
 - a. Importance of clear communications
 - b. Building a foundation for communications
3. Inter-office Communications
4. Communication Intersects
5. Dynamic Leadership and Communication: A New Paradigm
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

Topic: Dynamic Leadership and Communication

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Course Purpose/Learning Objectives

With staff growth in a financial advisory practice, challenges emerge in managing people effectively. The skills needed to be a good communicator with clients (persuasion) are different than the skills required to manage employees (team building). Thus, financial practitioners need to learn a different set of skills to maintain efficient communications in the workplace.

The course reviews methodologies for improving efficient communications in the office through a review of techniques designed to teach the skills necessary to manage a team of employees.

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**.