



The Efficient Practice: Transform and Optimize Your Financial Advisory Practice for Greater Profits (Wiley Finance)

David L. Lawrence

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An essential guide to tools and techniques for achieving efficiency, productivity, and profitability in financial advisory firms

As a profession, financial advisors have been very well educated on how to be a financial advisor, but the industry does a poor job of preparing financial advisors to be great business owners. This book presents the Profit-Driven Architecture, a visual way of viewing the operational structure of a financial practice.

- Provides a concrete way of understanding and improving the interrelationship of different parts of the operations of a financial practice firm
- Explains how to increase the efficiency, productivity, and profitability of the firm, recognizing the interrelationships with one another
- Reveals how to increase the capacity and value of the practice

Given an aging population of financial advisors and increased focus on succession planning, increasing the value of a financial practice is a key deliverable of efficiency and this book showcases the best ways to do so.

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