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## Welcome to David Lawrence and Associates

Dear David,

Thank you for reading our quarterly newsletter. This newsletter is intended to keep you up-to-date on what is going on with David Lawrence and Associates. We hope you enjoy the information and invite you to share it with friends and co-workers.

## Workshops on Retirement Income Management and Practice Efficiency

David Lawrence, AIF in partnership with Michael Zmistowski, RFC are presenting a pre-conference style workshop on Retirement Income Management and Practice Efficiency at the 3rd Annual Financial Advisor Symposium in Las Vegas, NV on April 19th. This innovative workshop will provide a wealth of information and tools that can be used to transform a financial advisor's practice into a retirement income management practice. Included are financial planning concepts as well as operational tools to make a practice work more efficiently. This is an outstanding opportunity to take advantage of a growing trend with the profession toward the retired client. This workshop will also be offered in Tampa, Florida on March 30th following a preview at the Financial Professionals Education Expo held in Tampa on March 22nd. The pre-conference type workshop is being made available to any financial event. If you are associated with an organization such as the FPA, NAIFA, SFSP,



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### Featured Article



**David Lawrence, AIF is a much sought-after speaker on a variety of topics related to efficiency, leadership, technology and Financial Planning. He offers his speaking services**

NAPFA or others and would like further information, please contact David Lawrence at 877-296-6876 (toll-free).

## Efficiency Tools

Being a gadget guy has its drawbacks. There are simply too many gadgets out there for one person to own, much less use. Therefore, it is always helpful when information is shared relating to the utility of a particular gadget. And, if the gadget proves to be an efficient tool, so much the better. Such is the case with two software programs, available for free, that are offered as desktop search tools. The first comes to us from the good people at Yahoo and X1.

The enterprise version of its desktop search tool (<http://desktop.yahoo.com/>) boasts productivity gains through unified, actionable search of desktop files and email without compromising your existing security. As the definitive search experience for business users, X1 changes how knowledge workers store, search, find and take action on information.

X1 Enterprise Client allows you to search and instantly find information on your local PC, preview it in its native format and take action on it immediately. This effectively reduces or eliminates the time that you spend hunting through various applications, email and file folders for information you already know exists. With support for over 300 file types, this software offers lightning fast searches with its user friendly interface which is conveniently placed (minimized) in your system tray.

The desktop search tool integrates seamlessly into Microsoft Outlook and/or Lotus Notes. Offering indexing and search tools from within those programs, as well as Eudora, Thunderbird and others. Google offers a similar product. Google Desktop (<http://desktop.google.com/>) gives you easy access to information on your computer and from the web. It's a desktop search application that provides full text search over your email, files, music, photos, chats, Gmail, web pages that you've viewed, and more. By making your computer searchable, Google Desktop puts your information easily within your reach and frees you from having to manually organize your files, emails and bookmarks. It makes searching your computer as easy as searching the web with Google. Google Desktop doesn't just help you search your computer; it also helps you gather new information

**to organizations, chapters and events at a nominal speaking fee. However, he may waive his fee in special circumstances. He does ask that his travel-related expenses be covered by the organization. For further details, please contact us at (877) 296-6876 (toll-free).**

### Featured Article



**David L. Lawrence, AIF is a featured monthly columnist with Financial Advisor Magazine. To read his column, visit [www.fa-mag.com](http://www.fa-mag.com)**

from the web Sidebar and Google Gadgets, which can be placed anywhere on your desktop to show you new email, weather, stock information, photos, personalized news, RSS/Atom feeds, and more. Sidebar is personalized automatically, without any manual configuration required (though you can certainly make your own customizations if you want to or turn off automatic personalization). Sidebar takes up room on your computer screen, but with added features, such as weather, stock info, email, etc, it offers a more integrated and robust information portal.

***David Lawrence, AIF***  
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