

# **Paul Calendrillo**

**President at The Excellence in Practice Enterprise**

New York, NY, US

Highly motivational speaker with over 30 years experience successfully helping financial sales professionals increase revenues.

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## **Biography**

Paul Calendrillo has held senior positions with Merrill Lynch, Citicorp, PaineWebber, and NatWest Bank. He is presently President of the Excellence in Practice Enterprise. Through Paul's signature coaching program, Breaking Barriers, successful Financial Sales Professionals have sustained long-term increases of 20% or more in their production, and more importantly, enhanced their professionalism. Paul is the author of the book, The Unrivaled Professional, which details his proprietary relationship selling model. Through Paul's leadership, EPE has built solid relationships since 1997 with some of the most respected financial services organizations in the United States. These institutions rely on EPE to design and deliver productivity improvement programs of the highest quality.

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## **Availability**

Keynote, Moderator, Panelist, Workshop, Author Appearance

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## **Industry Expertise**

Capital Markets, Banking, Financial Services

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## **Areas of Expertise**

High Impact Value Statements, Affinity Marketing for Financial Professionals, The Art of Profiling

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## **Sample Talks**

### **Affinity Marketing**

Our experience demonstrates that advisors who work smarter than their peers work more efficiently and are subsequently more successful. This lecture provides the tools and concepts needed to begin a marketing program that elevates prospect receptivity in the first few seconds of the initial contact.

## **High Impact Value Statements**

Successful Financial Advisors consistently remark that they have witnessed remarkable positive changes in the tone of each client meeting after reworking and using a value statement based on the principles delivered in this lecture. Lecture Outline The value of a value statement 1.Changes the tone of each meeting 2.Increases client receptivity 3.Positions the profiling step of the sales process 4.Brands the advisor's business 5.Distinguishes the advisor from the competition The anatomy of a value statement 1.Using other-centered language 2.The key benefits in the service philosophy 3.The key benefits in the investment philosophy Scripting 1.Key phrases 2.Customizing Paul's model scripts 3.Trial closes Setting the stage for the value statement 1.Build rapport 2.Transitions

## **The Art of Profiling**

Our objective is to provide a profiling process that leads to a psychological close prior to any discussion about investment solutions or products. The program opens with a thorough analysis of why effective profiling will make a significant difference to productivity, mitigate objections and concerns and help build relationships.

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## **Event Appearances**

### **High Impact Value Statements**

UBS New Financial Advisor Training

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## **Education**

**New York University**

MA Philosophy

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