



CASE STUDY



SITUATION

According to Financial Advisor Magazine, recent research from State Street Global Advisors shows that 55% of women between ages 25 and 34 prefer working with female advisors. It also finds that women using female advisors are more confident in their advisor's investing skills, and more likely to say their advisor has their best interest in mind and at heart.



SOLUTION

Phil Calandra, Founder, CEO and Advisor of Calandra Financial Group and Calandra Wealth Management hosted a Women, Wealth and Wine event for his female clients to announce his Women's Choice Award and thank them for their support over the years. "We hosted 32 women clients and 7 new potential clients. **The room was a buzz when our VP of Operations, Trish Overton, gave her opening remarks and reviewed the critical facts about the Women's Choice Award. My entire team was in the front of the room and we could all see just how enthusiastic these ladies were.** And of course, it was because they trusted our firm to guide them that this was possible. Midway through the event, one client after another began to speak out and comment about how our firm had helped them. This was unsolicited and extremely humbling to hear." – explains Phil.



SUCCESS

Many women feel more comfortable with female financial advisors, but Phil changed that perception by hosting an event for his clients and potential clients to announce that he had earned the award that is most trusted by WOMEN! Women can now feel the same comfort and trust with his firm knowing that he is an award-winning advisor "We had requests from five new potential clients to meet and several of the existing clients made appointments to discuss additional areas we can assist them. The Women's Choice Award played a big role in the success of our event"

"Needless to say, it was a very successful evening and it was exciting to see first-hand how much we as advisors can impact lives and make a difference. Thank you to the Women's Choice Award for this honor."

Phil Calandra, Founder, CEO and Advisor

To learn how we can support your success, please call (954) 922-0846

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