

Alan Parisse *MBA, CSP, CPAE*



“One of the Top 21 Speakers for the 21st Century”
-*Successful Meetings Magazine*

Financial Services BIOGRAPHY

An expert in dealing with difficult challenges, Parisse helps leaders and professionals address challenging markets, rapid change, mergers and more. His presentations include: ***The Changing Face of Financial Advice, Questions Great Financial Advisors Ask, This Is Your Time, The Great Salesperson, Thriving In Turbulent Times*** and ***The New Face of a Leader***.

When *Successful Meetings* magazine named Parisse one of the “Top 21 Speakers for the 21st Century” it was not a surprise. Alan is well known for helping individuals and organizations deal with challenging transitions. Often called the “thinking person’s motivator”, Parisse helps audiences reframe their thinking, let go of the past, organize for the future and take action. The insights and strategies he shares are a culmination of a career dedicated to overcoming difficulties by finding new ways to harness the forces of change and shape the future.

Parisse is a seasoned, financial services professional with over 20 years of experience. He is internationally respected for his insights into the impact of the changing, global economy on investment cycles and financial marketing. Alan’s clients include a wide variety of industry and governmental organizations. In high demand, Parisse has been a keynote speaker for a long list of securities firms, insurance companies and banks. In addition, he has been a guest lecturer at the **Stanford Business School, UC Berkeley Graduate School of Business, UCLA Graduate School of Management** and the **University Of Pennsylvania Wharton School Of Business**.

Parisse served as President of Mill-Park Consultants. In that role he assisted CIGNA and several other major financial firms in diversifying their product line to include non-traditional offerings. Parisse has also served as a senior executive for Oppenheimer and other national investment firms. In those roles, he was responsible for developing and marketing major investment banking strategies.

An accomplished author, Parisse’s ideas have been quoted in numerous business publications, including: ***The Wall Street Journal, Business Week*** and ***Barron’s***.

Alan Parisse’s books and courses include:

- **Questions Great Financial Advisors Ask** (co-author)
- **The Great Salesperson**
- **Taking Charge – Lessons In Leadership** (co-author)
- **This is Your Time: Empowering Today’s Financial Advisor** (co-author)
- **Power Marketing: Strategies for Financial Professionals**
- **The 101 Best Financial Marketing Ideas**
- **Tax-Advantaged Investments**
- **Financial Analysis of a Real Estate Investment**

Parisse's articles have appeared in numerous publications, including *Financial Planning Magazine*, *The Federal Home Loan Bank's Correspondent*, *Executive Excellence*, *Taxes*, *The Tax Magazine*, *Life Insurance Selling*, *The Bank Investment Representative*, *The Stanger Investment Advisor*, *SAM (Sales and Marketing)* and *The Real Estate Review*.

Education & Professional AFFILIATIONS

INDUCTEE:	Speaker's Hall of Fame
MEMBER:	NSA's Committee on Expertise Co-Chair
DESIGNEE:	Certified Speaking Professional
MEMBER:	National Speakers Association
PAST PRESIDENT:	Real Estate Securities and Syndication Institute (RESSI)
PAST COMMITTEE MEMBER:	National Association of Securities Dealers (NASD)
MEMBER:	Beta Gamma Sigma – National Honorary Business Fraternity
EDUCATION	MBA – University of Arizona

Financial Services Clients Served – PARTIAL LIST

Aetna	ING	New York Life
AIG	Guardian	Northwestern Mutual
Allstate	Insurance Association of Great Britain	Oppenheimer
American Express	Insurance Association of Singapore	Pacific Life
American General	ITT-Hartford	Penn Mutual
AXA	Jefferson Pilot	Phoenix Home Life
CIGNA	KPMG	PriceWaterhouseCoopers
Chubb	LIMRA	Principal
Colonial Life	Lincoln Financial	Prudential
Country Companies	Manulife	Securities Industry Association
CUNA Mutual	Mass Mutual	Smith Barney
Deloitte & Touche	MDRT and Top of the Table	State Farm
Ernst & Young	Merrill Lynch	Stifel
Farm Family Life	MetLife	SunAmerica
Fidelity	MFS	Sun Life
General American	Milliman	Transamerica
Great West Life	Nat'l Assoc. of Life Underwriters	Thrivent

"You were sensational. You set the stage for a magnificent Leadership Symposium – as we all knew you would."



"Your presentation was fantastic. We're so glad we had you on after our practice leaders. It ended up rescuing the tempo of the conference."



"Thank you for a wonderful session. I really appreciate all the research you did to make your message so tailored for our group. As you can see, you were a hit!"



"The feedback from our attendees was overwhelmingly positive. The specific action steps you outlined were right on."

