

# BNY MELLON CONSULTANT CONFERENCE

**Bob Carroll** - Head of Consultant Relations, BNY Mellon Asset Servicing

**Gerald Hassell** - Chairman and Chief Executive Officer, BNY Mellon

**Doug Shulman** - Senior Executive Vice President and Global Head of Client Service Delivery, BNY Mellon

**Neil DiCicco** - Technology Product Manager, BNY Mellon

**Jennifer Cole** - Head of New Business Creation for Client Technology Solutions

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**Bob Carroll:** Our consultants are all about creating successful outcomes for their clients and we understand what they need in order to get there. They need access to good data, they need industry experts that can help them understand the changing environment, and they need leading edge technology to support their investment operations.

We really see ourselves as helping consultants connect the dots across BNY Mellon. Communicating with the consultants is really important. It is probably the most critical thing that we do. We conduct an annual conference. It is a great opportunity for the consultants to interact with our leadership team, hear about our strategy, get an understanding of our new products and solutions.

**Gerald Hassell:** We have gone through a whole series of waves of transformation. We wouldn't be a 232-year-old company if we didn't evolve and adapt to the circumstances in the marketplace.

**Doug Shulman:** Anyone in the industry, whether they're broker dealers, large banks, asset managers, asset owners, pension funds, corporations, anyone who is awake and paying attention knows that with all the things happening, it is moving a lot quicker than it has ever moved and that they need to be figuring out not just how are things working today, but where do they need to work in the future.

**Bob Carroll:** The topics that we covered are really driven by feedback from the consultants on what is most important to their clients. The theme of this year's conference was "Shaping the Industry." We spent time with our business leaders talking about the challenges our clients are facing and how we're positioned to help support them. We heard products from our global



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market team and what we're doing to support our clients' investments in alternatives. And the most important session of the day, we gave consultants an update on NEXEN®; our next generation technology that we truly believe is shaping the future of the industry.

**Neil DiCicco:** We're delivering now over 60 features from five lines of business through a NEXEN® gateway.

**Jennifer Cole:** It is really about being able to get near real-time data, to be able to see what we're seeing, work much more closely together to be proactive instead of reactive and the ease of use is really improving the customer experience.

**Bob Carroll:** Our consultant relations team understands the critical role that consultants play in our clients' investment process. We also understand the challenges that the changing landscape present. It is our job to help consultants create successful stories for their clients.



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