

August 2024

## Be Client Obsessed - video transcript

[Background music]

**Ryan Chan**, *Global Client Management Associate*: Never really done anything like this before.

**Serkan Bektas**, *Head of Client Solutions Group*: Not exactly a TV character, so some learning for sure.

**Serkan Bektas**: Being client obsessed is the principle that resonates the most with me.

**Cathinka Wahlstrom**, *Chief Commercial Officer*: I'm going to go as far as to say that we exist to serve our clients with excellence.

**Ryan Chan**: My parents are restaurateurs, so the idea of customer service is really nailed into me. The person that really delivers that customer service is the waiter. You really wants that person to be there for you without you even having to ask.

**Eric Boughner**, *Chairman BNY Pittsburgh/BNY Wealth Regional President*: When I think about someone that's truly client obsessed, it's someone that listens more than they talk, asks questions, understands, build deep relationships that aren't transactional in one way.

**Cathinka Wahlstrom**: We have an enormous responsibility, but also opportunity to be there for our clients throughout their financial journey, financial life cycle.

**Eric Boughner**: You have to really generally want to know about their business and what they're doing.

**Ryan Chan**: Everyone's on top of their clients news, on top of their clients financials, on top of any trends that are happening in the industry.

**Agayla Sivakumar**, *BNY Pershing Senior Associate*: Understanding our client needs and challenges on a deep level and being proactive in providing solution to the problem that helps our organization grow consistently.

**Serkan Bektas**: At its heart, being client obsessed is about truly understanding our purpose and fulfilling it well.

**Eric Boughner**: Ultimately, what we do with our clients is their relationships, and they're no different than relationships we have with our friends and our family and colleagues and and classmates and anyone else you interact with.

**Cathinka Wahlstrom**: It's fantastic that they want to do work with us, but are we showing up every day? Are we on our best day every day? And that's really about making sure that they are our clients today and tomorrow.

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