

# Cesar Bastidas

## About New York Life Investments

New York Life Investments is comprised of the affiliated global asset management businesses of our parent company, New York Life Insurance Company (New York Life). We offer clients access to specialized, independent investment teams through our family of affiliated boutiques.

### Long lasting focus

Our focus is establishing long lasting, sustainable client relationships and providing investment solutions for client goals through every economic cycle.

### Domain expertise

Our multi-boutique approach offers diverse, independent thinking that translates to thoughtful solutions that seek to deliver client outcomes.

### Relationship-driven

Our "relationship" model is based on a simple premise that when you truly understand your client, you can serve them better and more consistently.



## Cesar Bastidas

Director, Advisor Advancement Institute

Cesar Bastidas joined New York Life Investments in 2014 as Director, Head of Internal Sales leading a team of 39 sales professionals comprised of Internal Advisor Consultants and Sales Managers and today is a Director of the Advisor Advancement Institute. Cesar is responsible for development and delivery of various practice management themes to assist Senior Management and Financial Advisors at strategic partner firms across various topics including Building Effective Teams, Sustainable Investing and Client Acquisition & Retention.

Prior to joining New York Life Investments, Cesar spent 17 years at Oppenheimerfunds in various sales, training and leadership roles.

Cesar graduated from St. John's University with a Bachelor of Science degree in Marketing and holds Series 7, 63 and 24 FINRA registrations. Cesar resides in New Jersey with his wife and 3 children.

The Advisor Advancement Institute is a program within New York Life Investments. "New York Life Investments" is both a service mark, and the common trade name, of certain investment advisors affiliated with New York Life Insurance Company.

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