

INVESTED IN ENDOWMENTS AND FOUNDATIONS

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Karolyn Ferris: In today's environment, endowments, foundations, and healthcare clients are looking internally at their operating infrastructure. They want to ensure that it is efficient and it has the appropriate risk and controls.

Andrew Mutschler: Albert Einstein said the measure of one person's intelligence is their ability to change. We are seeing an evolution in this marketplace specifically with the endowment and foundation clients. There is a race to refresh technology, and BNY Mellon absolutely recognizes that and is at the forefront of that race.

With our online reporting, being integrated with these clients, we are trying to help them meet these challenges head on so that they can focus on what they need to for their constituents.

Karolyn: It is a really exciting time. We are beginning to work with organizations that would not have been in scope in years past. More and more FinTechs are coming to market and providing efficiencies to asset owners, investment managers, and ourselves. We have been progressing in this path over the past couple of years to ensure that not only are we able to provide internal operating efficiencies to our clients, but also working with those organizations to facilitate some of our own.

Andrew: One of the interesting things about the endowment and foundation market is this is a set of clients that really is meant to invest in perpetuity, so how they base themselves from an investing perspective is very different than a traditional client. Because of that, we're seeing, really, a large weight towards alternative investments.

Karolyn: Clients today are risk-focused, and what we are doing is looking at our clients' asset allocations strategy to be able to identify the appropriate product and solution set. The goal is to ensure that we are working with them, aligning with them, to provide them with the right operational infrastructure within their businesses.



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“The Kresge Foundation staff is deeply grateful for the partnership approach that BNY Mellon’s Endowment and Foundation staff takes with us. We always feel like we are their number one priority.”

Andrew: BNY Mellon is uniquely positioned to service endowment and foundations with both our scale in data and our quality and service and people, and deliver innovation solutions to market quickly.

Karolyn: At BNY Mellon, we are here and ready to help you every step of the way.

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