



Fiduciary Fatigue? There's a Remedy for That

In a world where fiduciaries are spread too thin, BNY Mellon is uniquely positioned to partner with you as a co-fiduciary to lighten your load. As a global investments company, we provide an integrated solution that helps our clients manage and service their assets.

BNY Mellon: A Co-Fiduciary Invested in Your Well-Being

BNY Mellon has the expertise to help fiduciaries develop an appropriate investment strategy, select investment managers, provide oversight/reporting and safeguard assets.



Co-Fiduciary Benefits

SIMPLIFY

One provider can serve as a single point of contact while coordinating fiduciary activities.

DELEGATE

By hiring a discretionary manager, you can delegate cash management, rebalancing and manager due diligence.

REDUCE FEES

Based on our experience, hiring a co-fiduciary may reduce total plan management fees by 30% or more.

Why BNY Mellon

CAPABILITIES

BNY Mellon has extensive resources that can be drawn upon in managing a pool of assets. These resources include investment professionals, attorneys, actuaries, economists, traders, technologists and trust/ custody experts.

EXPERIENCE

- One of the largest investment managers and servicers
- A highly-rated financial institution
- Over 30 years of fiduciary management experience
- More than 120 institutional fiduciary management clients

What's Included?

INVESTMENT MANAGEMENT

- Needs assessment
- Asset / liability analysis
- Asset allocation and guidelines
- Manager evaluation, selection and replacement
- Periodic rebalancing

INVESTMENT SERVICING

- Serve as Trustee
- Safekeeping of assets
- Accounting reporting
- Benefit disbursements

OVERSIGHT & REPORTING

- Governance support
- Performance and analytics
- Management dashboards
- Funding status monitoring



About BNY Mellon

BNY Mellon is a global investments company dedicated to helping its clients manage and service their financial assets throughout the investment lifecycle. Whether providing financial services for institutions, corporations or individual investors, BNY Mellon delivers informed investment management and investment services in 35 countries and more than 100 markets. As of March 31, 2015, BNY Mellon had \$28.5 trillion in assets under custody and/or administration, and \$1.7 trillion in assets under management. BNY Mellon can act as a single point of contact for clients looking to create, trade, hold, manage, service, distribute or restructure investments. BNY Mellon is the corporate brand of The Bank of New York Mellon Corporation (NYSE: BK). Learn more at www.bnymellon.com, or follow us on Twitter @BNYMellon.

BNY Mellon Investment Management is one of the world's leading investment management organizations and one of the top U.S. wealth managers, encompassing BNY Mellon's affiliated investment management firms, wealth management organization and global distribution companies. BNY Mellon is the corporate brand of The Bank of New York Mellon Corporation and may also be used as a generic term to reference the Corporation as a whole or its various subsidiaries generally. Products and services may be provided under various brand names and in various countries by subsidiaries, affiliates, and joint ventures of The Bank of New York Mellon Corporation where authorized and regulated as required within each jurisdiction.

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