

What We Do

Corporate Pension Plan

Asset Management

- Investment management
- Multi-manager platform
- Performance reporting
- Comprehensive monitoring
- Manager replacement
- Portfolio rebalancing
- Transition management

Advisory Services

- Fiduciary
- Annual ALM studies
- Custom liability benchmarks
- Liability-Driven Investing
- Objective-setting
- Investment guidelines
- Asset allocation

Asset Servicing

- Comprehensive reporting
- Online account access
- Accounting statements
- Global custody platform
- Technology leader
- Benefit payments

Risk Management

- Market/interest rate risk
- Funded status levels
- Cash requirements
- Financial impact
- Custom reporting
- Monitor risks

Our Advantages

1

Simplified Plan Management

BNY Mellon Pension Services coordinates the delivery of all core services required to effectively and efficiently manage the plans. This approach will streamline plan management activities and reduce the demands on finance and HR staff.

2

Superior Investment Management

As the 4th largest U.S. institutional tax-exempt manager, BNY Mellon Asset Management offers more than 200 institutional asset management products, covering most investment styles.

3

Expanded Advisory Services

BNY Mellon Pension Services provides a complete set of advisory services, including asset/liability management studies for asset allocation decisions, and Board-ready custom liability benchmark reporting.

4

Reduce Plan Operating Costs

BNY Mellon Pension Services' integrated solution delivers a wide range of services to improve the management of the plan while reducing overall operating costs.

What We Look For

Characteristics

- DB plan spin-offs from larger plans
- Frozen DB plans
- Plans wishing to consolidate services
- Plans exploring an LDI strategy
- Other plans including endowments, foundations, OPEB plans, etc.

Fund Size

- Anywhere from \$10 million to \$1 billion
- Sweet spot of \$50 million to \$200 million

Who to Contact

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