Hello, my name is Jamie Lewin. I’m pleased to announce the launch of a new investment function at BNY Mellon called BNY Mellon Investor Solutions.

The Investor Solutions team is comprised of approximately 60 investment professionals with expertise across multiple disciplines that include: asset allocation, portfolio construction, risk management, manager research and multi-asset portfolio management. Collectively the team offers both discretionary portfolio management and non-discretionary investment advisory services to a full range of investor types including: corporations, endowments, foundations, family offices, registered investment advisors, sovereigns, and insurers.

Details relating to the full range of services offered by Investor Solutions can be found on our website. However, they are easily summarised in to two related, but distinct, capabilities: Customised Portfolio Solutions and Outsourced Chief Investment Officer (or OCIO) services.

Our Customised Portfolio Solutions menu includes: model portfolios, tailored multi-asset and multi-manager strategies, risk overlay programs, customised alternatives programs and obligations-driven solutions.

Our OCIO service model includes: portfolio design, asset allocation and portfolio construction, manager research, investment analytics, ad-hoc research and trust and custody services.

For many years BNY Mellon has offered these services to its wealth management and investment management clients, supported by various investment teams from across our organisation. So in many ways the launch of BNY Mellon Investor Solutions represents an expansion of our existing offering into a single investment unit.

The bringing together of existing resources to form the BNY Mellon Investor Solutions function allows us to execute the five pillars of our approach to support the investment needs of our clients with greater precision; to consult with an investor to better understand their unique needs and preferences; to design a tailored solution specific to their needs; to execute on the solution according to their parameters; to analyse the investor’s portfolio and provide a comprehensive risk assessment, and to provide the infrastructure to support their operating and governance requirements.

If there’s a take-away message here, it’s that we’re launching BNY Investor Solutions for the benefit of our clients. The launch of BNY Mellon Investor Solutions is proof of our continued evolution towards a solutions-oriented investment platform— one that empowers our clients to access, with ease, the full array of products and services available across BNY Mellon to address their unique needs.
All investments involve risk, including the possible loss of principal. Certain investments involve greater or unique risks that should be considered along with the objectives, fees, and expenses before investing.

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BNY Mellon Investor Solutions, LLC is an investment adviser registered as such with the U.S. Securities and Exchange Commission (“SEC”) pursuant to the Investment Advisers Act of 1940, as amended. BNY Mellon Investor Solutions, LLC is a subsidiary of The Bank of New York Mellon Corporation. BNY Mellon Investor Solutions, LLC business is described in Form ADV, Part 1 and 2, which can be obtained from the SEC.gov website or obtained upon request.

Personnel of certain of our BNY Mellon affiliates may act as: (i) registered representatives of BNY Mellon Securities Corporation (in its capacity as a registered broker-dealer) to offer securities, (ii) officers of the Bank of New York Mellon (a New York chartered bank) to offer bank-maintained collective investment funds, and (iii). Associated Persons of BNY Mellon Securities Corporation (in its capacity as a registered investment adviser) to offer separately managed accounts managed by BNY Mellon Investment Management firms.

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