

The Wall Street Journal news department was not involved in the creation of this content.

PRESS RELEASE | November 20, 2013, 10:05 a.m. ET

Pershing Enhances NetX360(R) Platform with Additional Third-Party Technology Integrations

New portfolio rebalancing, forms management and CRM capabilities will help improve advisor efficiency and effectiveness

JERSEY CITY, N.J., Nov. 20, 2013 /PRNewswire/ -- Pershing LLC, a BNY Mellon company, today announced several enhancements to NetX360(R), its technology platform for advisors. NetX360 now offers additional integrations with two popular portfolio management and rebalancing solutions -- Blaze Portfolio and Portfolio Pathway. Also, as part of its client onboarding solution, NetX360 now provides Laser App(R) forms management and configuration tools. In addition to these integrations, users of the NetX360 can now directly access Ebix Smart Office customer relationship management (CRM) software via a single sign-on process.

"Together, these new integrations provide advisors with greater flexibility in their choice of third-party solutions, while increasing their efficiency and effectiveness," said Ram Nagappan, chief information officer, Pershing. "Our open architecture enables us to make integrations to NetX360 easier, and they represent our commitment to the continuous improvement of our platform to deliver the solutions advisors need to manage and grow their practice."

Pershing's deeper integration with rebalancing and trading solutions from Blaze Portfolio and Portfolio Pathway will allow advisors to leverage straight through processing between Pershing's platform and their chosen modeling and rebalancing solution for equities and mutual funds. Importing and exporting files between these platforms and NetX360, which was formerly a manual process, is now automated and seamless, enabling advisors to spend less time managing rebalancing and trading operations.

Through a strategic relationship with Laser App, the industry leader in forms management, and configuration tools available in our new account opening platform, Pershing is also delivering a more efficient forms management solution for clients.

Pershing's clients can now create custom forms branded with their logo, disclosure language, investment objectives and custom data fields in a more streamlined and efficient manner. The Laser App integration enables firms to:

- Quickly add, delete, or change custom forms to support their new account onboarding process
- Define new account forms rules (which forms are mandatory and/or optional based on registration type)
- More effectively control the amount of data that is required in order to submit new account applications
- Customize the new account opening user interface for their advisors via a robust configuration tool

Additionally, through collaboration with Ebix, Ebix's SmartOffice is now integrated with NetX360 as well-- which enables advisors using NetX360 to have single sign-on access to SmartOffice. This integration will create a convenient, time saving and secure way to access both applications.

Pershing and its affiliates provide global financial business solutions to approximately 1,600 financial organizations, broker-dealers, registered investment advisory firms, advisors, fund managers and asset managers who represent over 5.6 million active accounts. Located in 23 offices worldwide, Pershing delivers dependable operational support, robust trading services, flexible technology, an expansive array of investment solutions, practice management support and service excellence. Pershing is a member of every major U.S. securities exchange, and its international affiliates are members of the Deutsche Borse, Australian Stock Exchange, Irish Stock Exchange, London Stock Exchange and Toronto Stock Exchange. Pershing LLC (member FINRA/NYSE/SIPC) is a BNY Mellon company. Additional information is available on pershing.com, or follow us on Twitter @Pershing.

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 September 30, 2013, BNY Mellon had \$27.4 trillion in assets under custody and/or administration, and \$1.5 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). Additional information is available on www.bnymellon.com, or follow us on Twitter @BNYMellon.

Contact: Paul Patella

+1 201 413 3609

paul.patella@pershing.com

SOURCE BNY Mellon

/Web site: <http://www.bnymellon.com>

The Wall Street Journal news department was not involved in the creation of this content.