



BNY BRAND CHANGE UPDATE

Client Information Document

July 2024





OVERVIEW

On June 11, 2024, we announced our brand update from BNY Mellon to BNY, in order to improve the industry's familiarity with who we are and what we do.

Additional brand updates include:

- BNY Mellon Investment Management is now **BNY Investments**
- BNY Mellon Wealth Management is now **BNY Wealth**
- BNY Mellon Pershing is now **BNY Pershing**

With these changes, we will also be updating our email domain and internet URL to "bny.com."

We recognize that there may be operational and technology considerations that need to be assessed by your firm to help ensure the communication channels between our firms operate as usual.



WHAT IS CHANGING?

Email addresses with the domain "bny.com" have been established for all BNY employees and contractors as of June 11, 2024, with the exception of Investment Management firms and CIBC Mellon. Effective immediately, please note the following:

- All external messages from **outside of BNY** directed to the new "**bny.com**" domain will be received.
- Emails sent to the original "**bnymellon.com**" and "**pershing.com**" domains will work in perpetuity.
- All existing system-based connectivity and authentication will continue until further notice.

BNY has established a transition period of 90-120 days whereby:

- Replies from BNY will still come from the "bnymellon.com" and "pershing.com" domains.
- Following this period, individual email addresses for BNY employees and contractors will be switched from "bnymellon.com" or "pershing.com" to "bny.com."

In the interim, we encourage you to begin using our "bny.com" email domain exclusively going forward but be aware that subsequent work on shared and team mailboxes may take up to 12 months.



WHAT CONSIDERATIONS DOES MY FIRM NEED TO ASSESS?

For Client Technology and Security teams

The below considerations are intended for your organization's technology and security teams.

For your email system administrators:

- If you currently have "bnymellon.com" or "pershing.com" added to any safe or access lists, add "bny.com" to those same lists. Do not remove the existing "bnymellon.com" or "pershing.com" legacy domains.
- Ensure "bny.com" does not appear on any block lists.
- If Enforced Transport Layer Security (TLS) is being used for emails to "bnymellon.com" or "pershing.com," add "bny.com" to the TLS Enforced Outbound list.

For your Microsoft 365 and application administrators:

- If "bnymellon.com" or "pershing.com" is on the SharePoint Federated Allow or Teams Shared Channels lists, add "bny.com." Do not remove the existing legacy BNY Mellon or Pershing domains.
- If your organization is using Microsoft Teams Federated Chat with "bnymellon.com" or "pershing.com," add "bny.com" to the federated allow list.
- Alert your internal staff supporting BNY by forwarding this notification to them directly.
- Educate your workforce, at your discretion, to minimize the reporting of emails from "bny.com" addresses as phishing attempts.

For Client Workforces

The below considerations are intended for individuals or teams working directly with BNY staff.

- Review personal or shared mailbox routing rules and update them to support messages from "bny.com" in the same manner.
- Update any workflows, macros, or other automations that may be using "bnymellon.com" or "pershing.com" to include "bny.com."
- Avoid reporting emails from "bny.com" addresses as phishing attempts. Carefully review the email's messaging before determining whether or not it is phishing.



ADDITIONAL GUIDANCE AND SUPPORT

We are advising you as early as possible in an effort to help you effectively prepare for these changes and remind you to share this information with the appropriate operational and technology contacts at your firm, as well as third-party providers and clients that engage with us on your firm's behalf, for potential action. BNY is committed to providing you with the highest standards of service, and we appreciate the trust and confidence that you place in us.

We look forward to continuing to provide you with a world-class experience.

Should you wish to discuss these changes further, please reach out to your BNY representative.

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In the UK, a number of services associated with BNY Mellon Wealth Management's Family Office Services – International are provided through The Bank of New York Mellon, London Branch.

The Bank of New York Mellon also operates in the UK through its London branch (UK companies house numbers FC005522 and BR000818) at 160 Queen Victoria Street, London EC4V 4LA, and One Canada Square, London, E14 5AL and is subject to regulation by the Financial Conduct Authority (FCA) and limited regulation by the PRA. Details about the extent of our regulation by the PRA are available from us on request.

Investment management services are offered through BNY Mellon Investment Management EMEA Limited, 160 Queen Victoria Street, London EC4V 4LA, which is registered in England No. 1118580 and is authorised and regulated by the Financial Conduct Authority. Offshore trust and administration services are through BNY Mellon Trust Company (Cayman) Ltd.

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