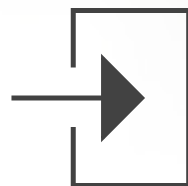


eDelivery

GO DIGITAL WITH SOLUTIONS FROM
BNY MELLON | PERSHING

Get Started





Go
from
this ...

The world is changing — seemingly by the minute.
The trend of receiving paper statements and notifications is becoming a thing of the past.



to this ...
with eDelivery.

BNY Mellon | Pershing's electronic delivery service — eDelivery — is a simpler, speedier and more secure way for clients to receive communications and account-related documents, online, on-demand and at their convenience.

eDelivery ...

A GAME CHANGER FOR YOUR BUSINESS MODEL



eDelivery Fact #1

[Click here >](#)

eDelivery can be a powerful way to deepen your client relationships by simplifying routine account-related communications — including statements, confirmations, prospectuses and much more.

Introduce new efficiencies by reducing the time spent fielding calls related to fulfilling statement reprints or eliminating investment statement costs (if applicable).



eDelivery ...

A GAME CHANGER FOR YOUR BUSINESS MODEL



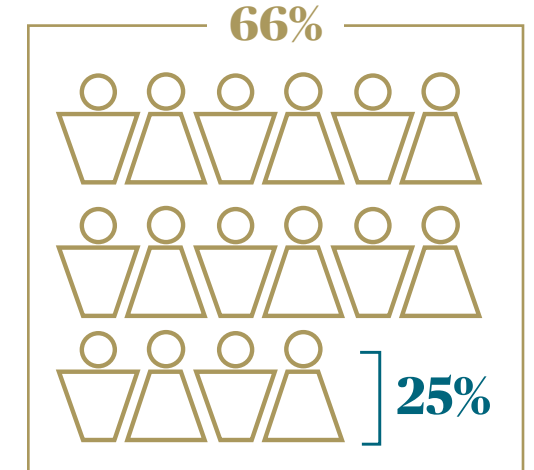
eDelivery Fact #1

eDelivery can be a powerful way to deepen your client relationships by simplifying routine account-related communications — including statements, confirmations, prospectuses and much more.

Introduce new efficiencies by reducing the time spent fielding calls related to fulfilling statement reprints or eliminating investment statement costs (if applicable).




Among clients who are not enrolled in eDelivery, **66%** would consider enrolling. Baby Boomers make up **25%** of that segment.





Source: "e-Delivery Preferences vs. e-Delivery Services: Are They Aligned?," DALBAR, 2020.


Unlock the Value of eDelivery


Click the icons below to unlock the options.


FOR FIRMS 



FOR ADVISORS 



FOR CLIENTS 



Unlock the Value of eDelivery

Click the icons below to unlock the options.

FOR FIRMS



- 1** Enhance the operational framework of your firm by offering a simple, speedy and secure process for delivering account-related documents to clients.
- 2** Reduce dependency on the physical production and mailing process
- 3** Redirect associated print and mailing expenses to focus on strategic initiatives to grow the business

FOR ADVISORS



FOR CLIENTS



Unlock the Value of eDelivery

Click the icons below to unlock the options.

FOR FIRMS



FOR ADVISORS



- 1** | Enhance the client experience and deepen relationships
- 2** | Reduce paper reprint requests from clients
- 3** | Increase time to focus on delivering comprehensive solutions and cross-selling opportunities
- 4** | Improve advisor satisfaction levels by offering a simple, speedy and secure experience for clients

FOR CLIENTS



Unlock the Value of eDelivery

Click the icons below to unlock the options.

FOR FIRMS



FOR ADVISORS



FOR CLIENTS



- 1 SIMPLER:**
Receive email communications when documents are ready to be viewed and access documents anytime through easy, centralized online search capabilities to eliminate paper clutter.
- 2 SPEEDIER:**
Enroll quickly and easily and access documents as soon as they are produced instead of waiting for postal delivery.
- 3 MORE SECURE:**
Increase peace of mind with safe and secure password-protected access.

Which Documents Are Available for eDelivery?



eDelivery Fact #2

[Click here >](#)

Clients have online access to a number of important documents, which can be key to managing their investments and tax reporting requirements.

- | | | | |
|---|---------------------------|---|--|
| 1 | Statements and reports | 5 | Quarterly performance reports ¹ |
| 2 | Trade confirmations | 6 | Proxy material, reorganization material and shareholder communications |
| 3 | Tax documents | 7 | Trade-confirming prospectuses for mutual funds, ETFs and unit investment trusts ² |
| 4 | Notifications and letters | | |

¹ Not applicable to all clients. ² Not supported by all firms.

Source: "e-Delivery Preferences vs. e-Delivery Services: Are They Aligned?," DALBAR, 2020.



As a reminder, the eDelivery profile you establish for clients determines which documents are available.

Which Documents Are Available for eDelivery?



eDelivery Fact #2

Clients have online access to a number of important documents, which can be key to managing their investments and tax reporting requirements.

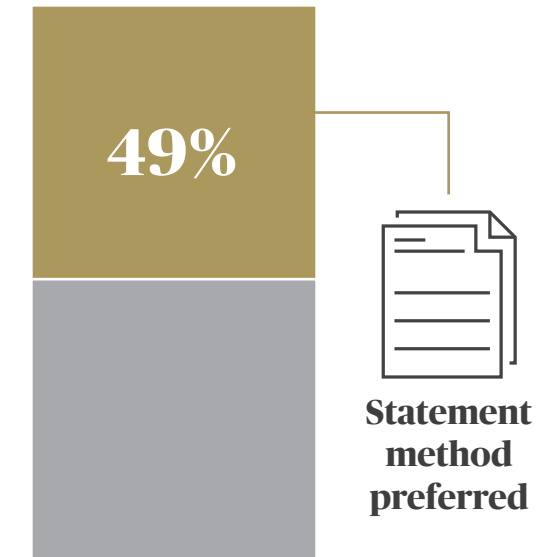
- | | | | |
|---|---------------------------|---|--|
| 1 | Statements and reports | 5 | Quarterly performance reports ¹ |
| 2 | Trade confirmations | 6 | Proxy material, reorganization material and shareholder communications |
| 3 | Tax documents | 7 | Trade-confirming prospectuses for mutual funds, ETFs and unit investment trusts ² |
| 4 | Notifications and letters | | |

¹ Not applicable to all clients. ² Not supported by all firms.

Source: "e-Delivery Preferences vs. e-Delivery Services: Are They Aligned?," DALBAR, 2020.



49% of clients who are **not enrolled** in eDelivery say their statement is the predominant method for obtaining account information.



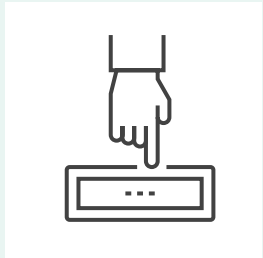
Get Started with eDelivery

THE ENROLLMENT PROCESS IS QUICK AND EASY.

eDelivery Fact #3
[Click here >](#)



Your clients can be enrolled at account opening or after the account is established.



**Self-registration
by the client³**



**Enroll
existing clients⁴**



**eDelivery
election at
account opening/
onboarding**

³ Where applicable, self-registration by the client is only available if enabled by the home office.

⁴ The client must acknowledge enrollment as part of the firm enrollment process.

Learn more

[Watch our Go Digital
with eDelivery video >](#)



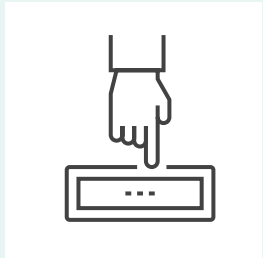
Get Started with eDelivery

THE ENROLLMENT PROCESS IS QUICK AND EASY.

eDelivery Fact #3



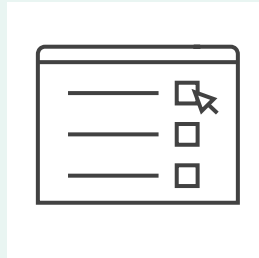
Your clients can be enrolled at account opening or after the account is established.



**Self-registration
by the client³**



**Enroll
existing clients⁴**



**eDelivery
election at
account opening/
onboarding**

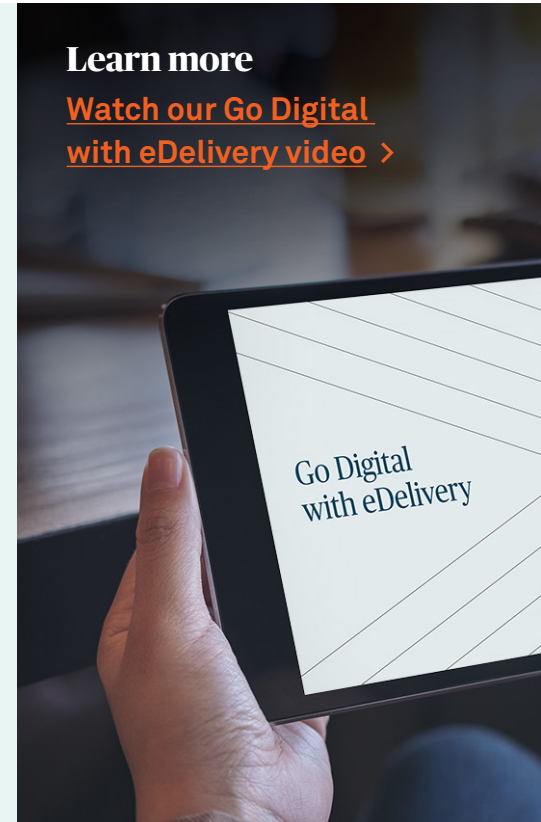
³ Where applicable, self-registration by the client is only available if enabled by the home office.

⁴ The client must acknowledge enrollment as part of the firm enrollment process.

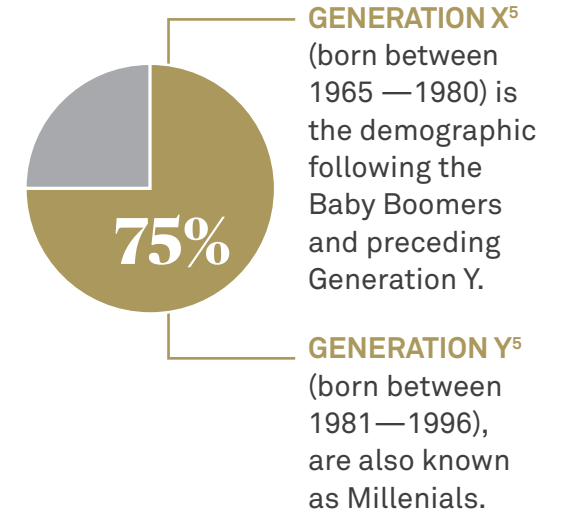
⁵ <https://www.pewresearch.org/fact-tank/2019/01/17/where-millennials-end-and-generation-z-begins/>

Learn more

[Watch our Go Digital
with eDelivery video >](#)



**Generation X and
Generation Y make up
75% of clients enrolled
in eDelivery.**



Dispelling eDelivery Myths

If you are facing obstacles that impact your eDelivery adoption efforts, let's look at a few eDelivery myths — and the actual facts.



MYTH ONE:

Older clients may not feel comfortable accessing financial information online.

[Get the Fact >](#)

MYTH TWO:

It takes too long to enroll in eDelivery.

[Get the Fact >](#)

MYTH THREE:

eDelivery does not have the appropriate safeguards in place to provide secure access.

[Get the Fact >](#)

MYTH FOUR:

eDelivery is a fad.

[Get the Fact >](#)

MYTH FIVE:

My clients will need to learn new technical skills to use eDelivery.

[Get the Fact >](#)

MYTH SIX:

eDelivery will keep me from providing my clients with exceptional customer service.

[Get the Fact >](#)

Dispelling eDelivery Myths



eDelivery Fact #4

[Click here >](#)

MYTH ONE:

Older clients may not feel comfortable accessing financial information online.

FACT ONE:

Many older clients are digitally connected. More than 73% of seniors use the internet, and more than 26 million own a smartphone.⁶

[< Back to Myths](#)



⁶Statistica.com, internet usage and smartphone usage by age group, 2020.

Dispelling eDelivery Myths



eDelivery Fact #4

MYTH ONE:

Older clients may not feel comfortable accessing financial information online.

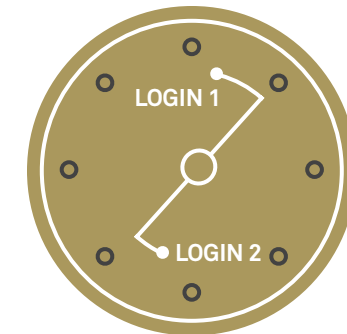
FACT ONE:

Many older clients are digitally connected. More than 73% of seniors use the internet, and more than 26 million own a smartphone.⁶

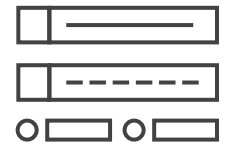
[< Back to Myths](#)



42% of clients enrolled in eDelivery log in to their online account once or more per day.



42%
eDelivery
login



⁶ Statista.com, internet usage and smartphone usage by age group, 2020.
Source: "e-Delivery Preferences vs. e-Delivery Services: Are They Aligned?," DALBAR, 2020.

Dispelling eDelivery Myths



eDelivery Fact #5

[Click here >](#)

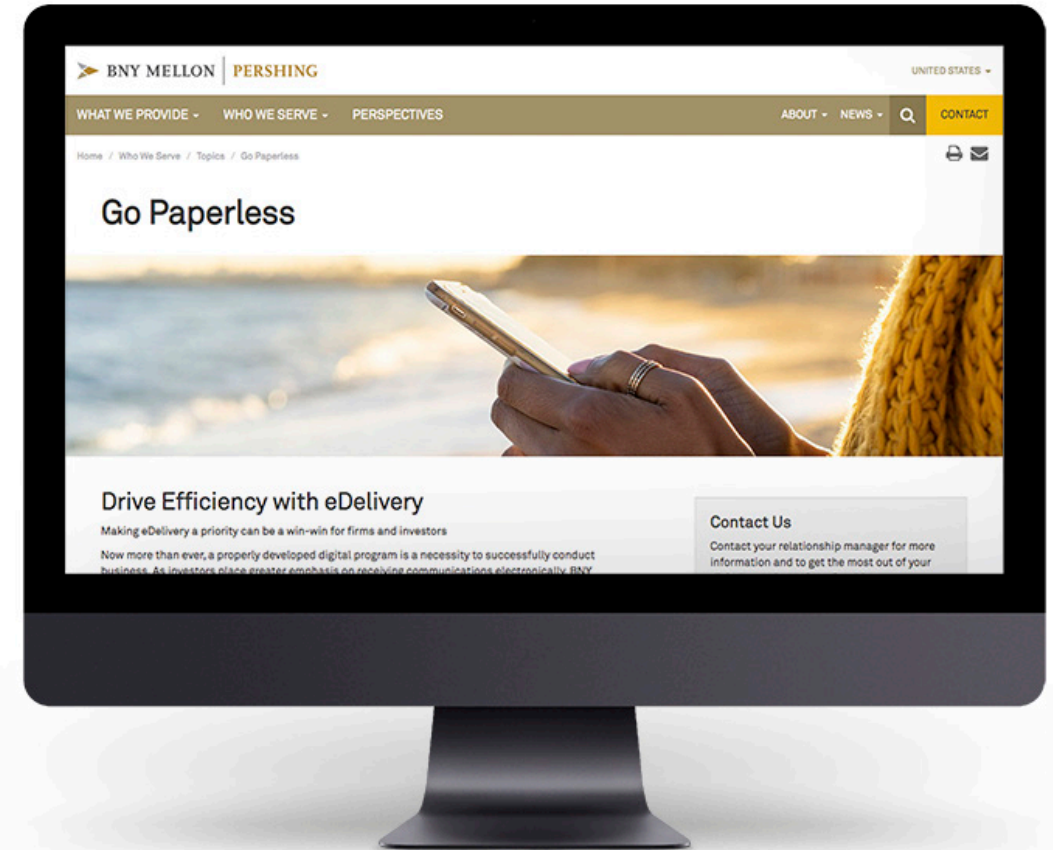
MYTH TWO:

It takes too long to enroll in eDelivery.

FACT TWO:

From start to finish, the enrollment process can be completed quickly. Clients can **self-register** in just a few clicks by selecting “**Go Paperless**” after logging in to their online account.⁷ One-click enrollment—which will make the process even easier—is scheduled to be introduced in the first half of 2021.⁸

[< Back to Myths](#)



⁷ Where applicable, enrollment can be initiated at the home office with acknowledgement by the client.

⁸ Date subject to change.

Dispelling eDelivery Myths



eDelivery Fact #5

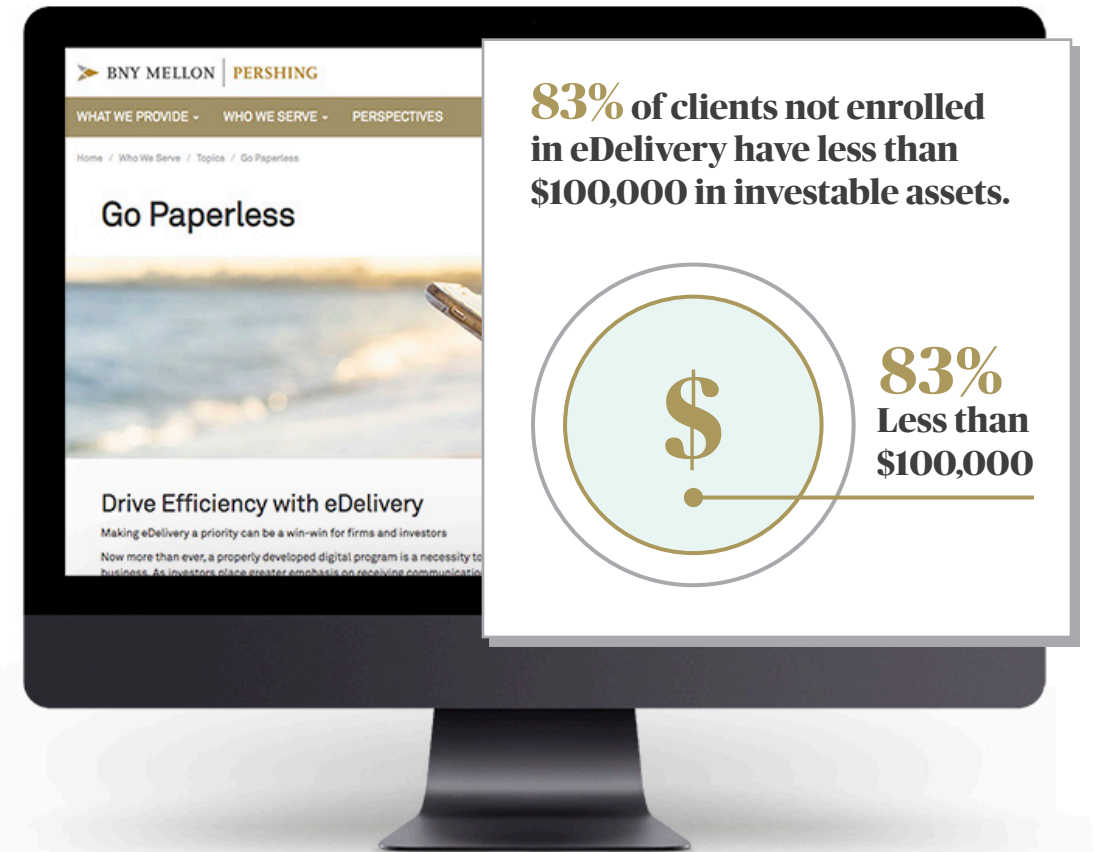
MYTH TWO:

It takes too long to enroll in eDelivery.

FACT TWO:

From start to finish, the enrollment process can be completed quickly. Clients can **self-register** in just a few clicks by selecting **“Go Paperless”** after logging in to their online account.⁷ One-click enrollment—which will make the process even easier—is scheduled to be introduced in the first half of 2021.⁸

[< Back to Myths](#)



⁷ Where applicable, enrollment can be initiated at the home office with acknowledgement by the client.

⁸ Date subject to change.

Source: “e-Delivery Preferences vs. e-Delivery Services: Are They Aligned?,” DALBAR, 2020.

Dispelling eDelivery Myths



eDelivery Fact #6

[Click here >](#)

MYTH THREE:

eDelivery does not have the appropriate safeguards in place to provide secure access.

FACT THREE:

With eDelivery, **clients access their confidential information** in a password-protected environment with a password they create and only they can change. As an additional safeguard, password and email address change notifications are communicated instantly through email with a confirmation of the change sent via regular mail.

[< Back to Myths](#)



Dispelling eDelivery Myths



eDelivery Fact #6

MYTH THREE:

eDelivery does not have the appropriate safeguards in place to provide secure access.

FACT THREE:

With eDelivery, **clients access their confidential information** in a password-protected environment with a password they create and only they can change. As an additional safeguard, password and email address change notifications are communicated instantly through email with a confirmation of the change sent via regular mail.

[< Back to Myths](#)



The top 3 reasons that have prompted clients to enroll in eDelivery are:

Web promotion
30%



Existing paper clutter
27%



Statement promotion
23%



Source: "e-Delivery Preferences vs. e-Delivery Services: Are They Aligned?," DALBAR, 2020.

Dispelling eDelivery Myths

MYTH FOUR:

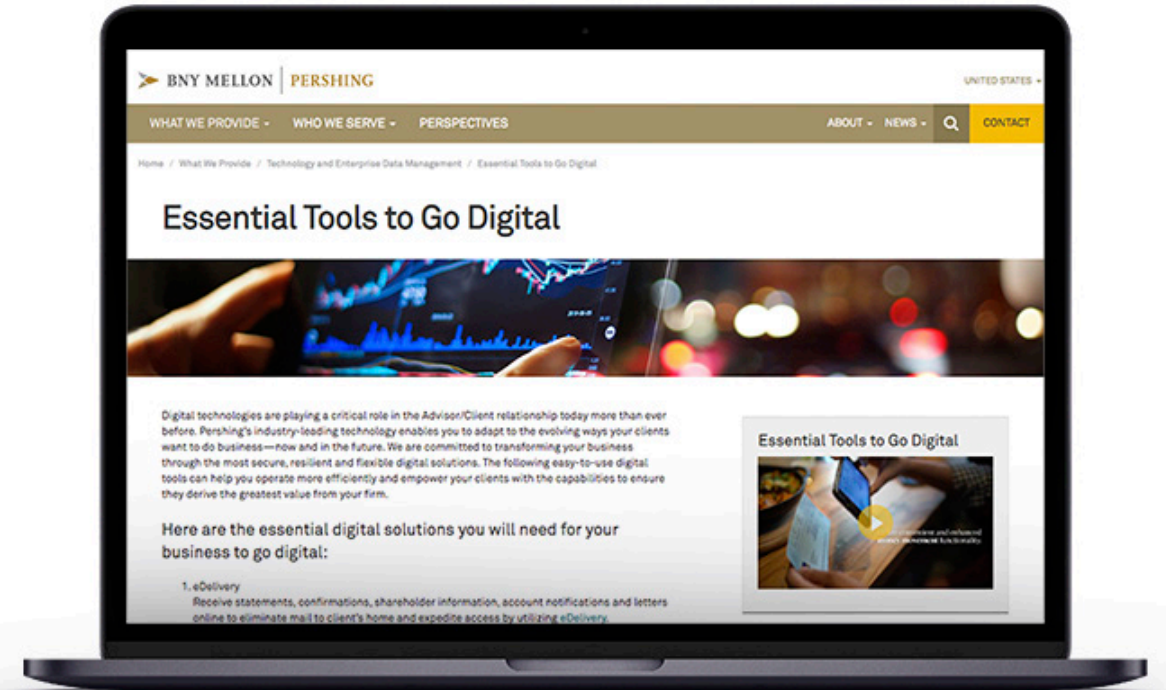
eDelivery is a fad.

FACT FOUR:

We are living in an increasingly virtual world where solutions like eDelivery are becoming standard practices. The industry as a whole has seen adoption rates climb to all-time highs as the pandemic has continued. **eDelivery is indeed the new reality.**

Now more than ever is **the time to embrace the future with eDelivery solutions** for clients, advisors and firms.

[< Back to Myths](#)



Dispelling eDelivery Myths

MYTH FIVE:

My clients will need to learn new technical skills to use eDelivery.

FACT FIVE:

If your client has a computer, phone or a tablet, and has an established online profile, **they are only a few clicks away from enrolling.** No new software is required. We take care of all the back-office logistics to make sure that your clients are notified when new documents are ready to be viewed.

[< Back to Myths](#)



Dispelling eDelivery Myths

MYTH SIX:

eDelivery will keep me from providing my clients with exceptional customer service.

FACT SIX:

You are not removed from the relationship with your clients when they enroll in eDelivery. In fact, without having to field as many requests for administrative tasks—like account statement and performance review reprints—you can **strengthen relationships with your clients by spending time on more meaningful engagements.**

[< Back to Myths](#)



For more information

[Click here](#) to see how eDelivery is a simpler, speedier and more secure solution that can transform your business. Contact your Relationship Manager to help you take eDelivery from “what if”... to “can do.”



Consider Everything



© 2020 Pershing LLC. Pershing LLC, member FINRA, NYSE, SIPC, is a subsidiary of The Bank of New York Mellon Corporation (BNY Mellon). Pershing does not provide investment advice. Affiliated investment advisory services, if offered, are provided by Lockwood Advisors, Inc. (Lockwood), a Pershing affiliate and an investment adviser registered in the United States under the Investment Advisers Act of 1940. For professional use only. Not intended for use by the general public. Trademark(s) belong to their respective owners.