

MANAGED ACCOUNT SOLUTIONS

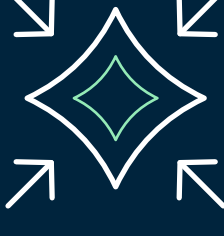
for Asset and Wealth Managers

Bring together the tools, workflows, and integrations you need to expand offerings, control cost, and deliver models consistently across channels.

Discover Managed Account Solutions Contact us

TURNING OBSTACLES INTO OPPORTUNITIES.

Managed accounts are evolving fast, driven by new expectations, rising complexity, and pressure to do more with less.



Growth pressure

Pressure to grow assets by expanding products and delivery options.
Accelerate innovation by packaging and scaling managed account offerings with confidence.



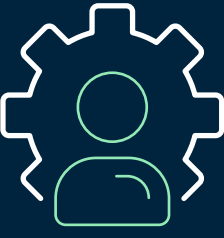
Legacy tech & process drag

Legacy technology and manual operations create friction and limit scalability.
Streamline workflows with an integrated, tech-enabled operating model that reduces operational drag.



Cost constraints

Pressure to maintain or reduce costs while complexity increases.
Improve efficiency through consistent processes and integration that help control cost-to-serve.



Personalization demand

Rising demand for personalized and tax-optimized SMAs and UMAs.
Deliver scalable personalization, including tax-smart strategies, without adding operational burden.



Model delivery inconsistency

Lack of standards makes model delivery inconsistent across partners and platforms.
Enable reliable, rotation-compliant model delivery with clearer controls and repeatable outcomes.

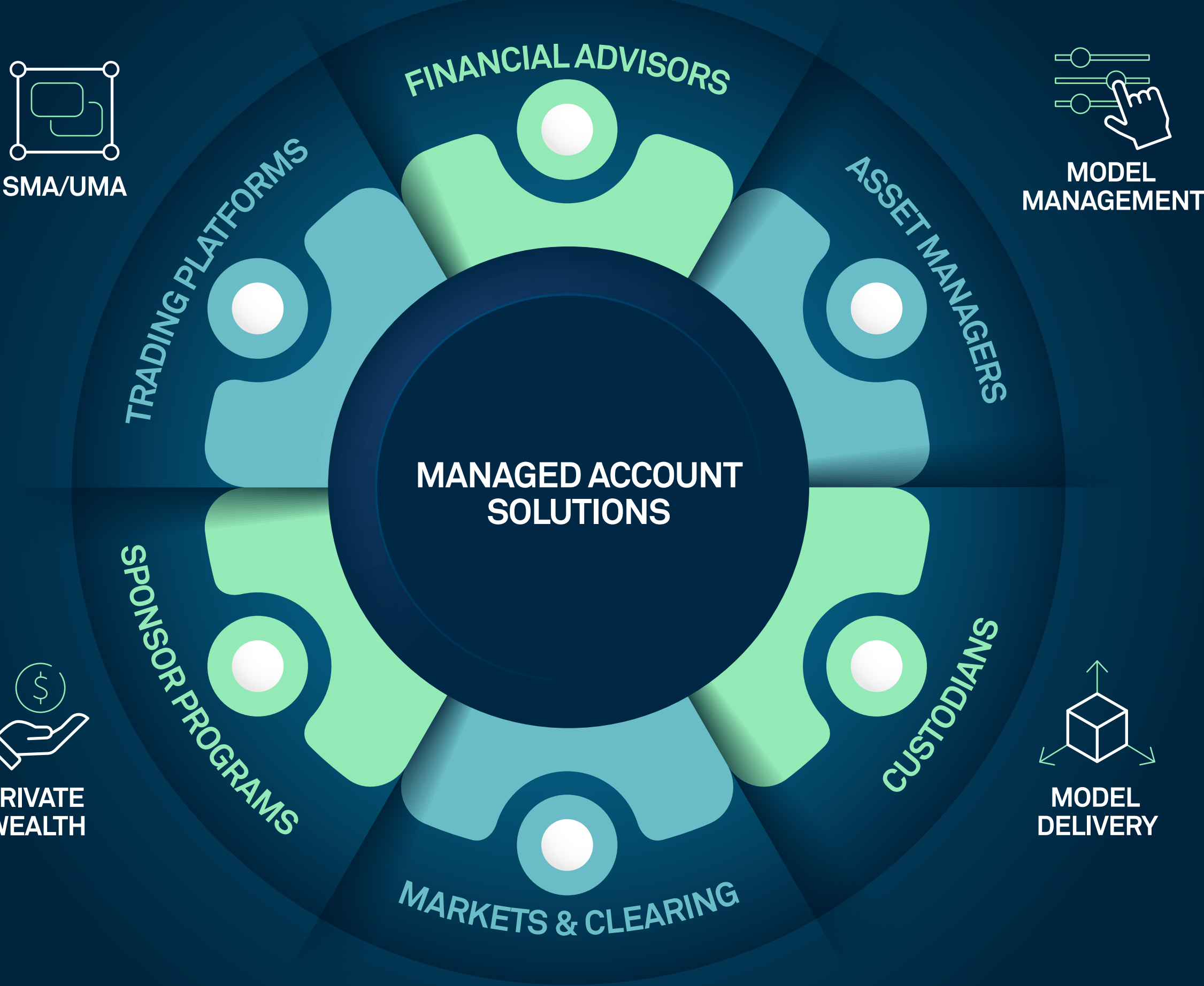


Transparency expectation

Clients expect greater transparency and more timely insight into portfolio activity.
Improve portfolio transparency with intraday reporting and clearer visibility across the lifecycle.

SEAMLESS CONNECTIONS, BOUNDLESS POSSIBILITIES.

A unified ecosystem that helps simplify delivery and scale outcomes.

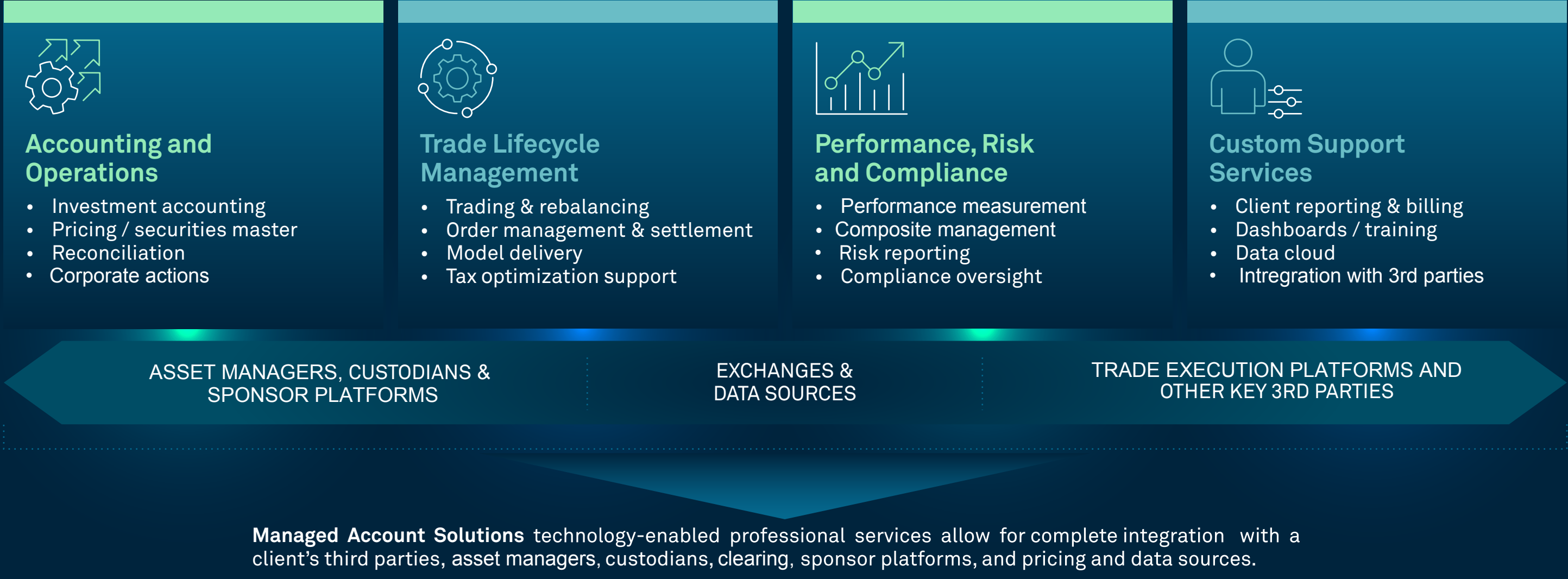


SIMPLIFY WITH A FULLY INTEGRATED SERVICE MODEL.

- Simplify operations**
Reduce friction across the managed account lifecycle, from model management to delivery to implementation.
- Connect the ecosystem**
Bring together key participants, from OMS and brokers to custodians and sponsors.
- Scale outcomes**
Support consistent delivery across channels, including SMA/UMA, model management, model delivery, and private wealth.

ONE PLATFORM. MULTIPLE SOLUTIONS.

BNY's Managed Account Solutions include unique services and transparency at every level.



Managed Account Solutions technology-enabled professional services allow for complete integration with a client's third parties, asset managers, custodians, clearing, sponsor platforms, and pricing and data sources.

PROOF IN PRACTICE.

Real-world results delivered by Managed Account Solutions (Archer technology) across retail, boutique, and global institutional programs.

**Retail SMA & UMA
Boutique Asset Manager**

Desire:
Meet demand for single/dual contract accounts and model delivery across intermediaries

Issues:
Legacy tech and operational strain; pressure for tax-optimized strategies

Solution:
Managed Account Solutions (Archer technology) enabled immediate scale; improved efficiency for tax-optimized/values-based strategies

Results:
6000+ ACCOUNTS
\$9B AUM
in 48 months

**Private Wealth
Multi-Asset Product Manager**

Desire:
Expand brand/AUM by packaging multi-asset strategies across flexible account structures

Issues:
Legacy tech couldn't support 100,000+ accounts; scaling limited by architecture/staffing

Solution:
Rebalanced 100,000+ accounts in less than 4 hours; enabled multi-sleeve accounts tied to single custodian account

Results:
DOUBLED AUM TO \$20B+
and 100,000+ accounts over five years

**Institutional
Global Institutional Asset Manager**

Desire:
Quick-to-market model aligned to acquisition growth strategy; support all global asset classes

Issues:
Acquisition-driven legacy tech increased cost/risk; needed one platform/security master across boutiques

Solution:
Converted entities on closing date: full integration with counterparties/internal reporting

Results:
6500+ ACCOUNTS
\$200B+
across distribution channels; supports funds/ETFs/SMAs/model delivery/institutional separate accounts

CONNECTED BY DESIGN. BUILT TO SCALE.

Get the clarity, control, and scale you need to meet evolving managed account demands.

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