

BNY Mellon's Lockwood Nearly Doubles the Number of Strategists on the Managed360[®] Program

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Firm adds 54 new model portfolios from six firms, significantly expanding the options available to financial professionals

King of Prussia, Pa. — BNY Mellon's Lockwood Advisors, Inc. (Lockwood) today today announced the addition of 54 new model portfolios to its Managed360 program, nearly doubling the number of strategists and underlying model portfolios available to financial professionals and bringing the total number of third-party model portfolios to 123 and strategists available via the program to 13¹.

Managed360 delivers a streamlined managed accounts experience, leveraging the power of Lockwood affiliate Pershing LLC's NetX360[®] platform to help financial professionals scale their managed accounts business.

The latest additions are mostly globally diversified portfolios that provide advisors and reps with a wider range of options to help them meet investors' evolving goals while also managing costs.

"Our clients are increasingly looking to enhance the client experience by spending more time with investors," said Joel Hempel, chief operating officer at BNY Mellon's Lockwood. "Model portfolio programs are proving instrumental in that regard as they can help financial advisors manage investor goals and scale business. By adding this group of well-recognized strategists to our program, we are providing financial professionals with a diverse selection of portfolios so they can focus on delivering a higher-touch experience to investors and drive business growth."

New strategists and models now available to clients on the Managed360 program are:

- **First Trust** – Nine new First Trust (FT) models, including: FT Strategic Risk (Aggressive Growth, Moderate Growth, Balanced Growth, Conservative Growth, and Capital Preservation) and FT Strategic Focus (All Equity, Equity Income, Diversified Low Duration Fixed Income, and High Income).
- **Goldman Sachs Asset Management** – Three Goldman Sachs ETF models: Asset Allocation Model Portfolio Conservative, Moderate, and Growth.
- **J.P. Morgan Asset Management** – Eight JP Morgan Asset Management (JPMAM) models, which combine JPMAM's strategic beta ETFs with third-party ETFs, along

with some of JPMAM's traditional active mutual funds. Models include: JPMorgan Global Multi-Asset Tactical (Conservative, Moderate Conservative, Moderate, Growth, and Aggressive Growth) and JP Morgan Dynamic Flexible (Conservative, Moderate, Growth) advisory portfolios.

- **New Frontier** – Fifteen New Frontier models, including the New Frontier ETF Multi-Asset models—ranging from income to balanced and growth, including tax-sensitive options—as well as the New Frontier ETF Income Advantaged model series.
- **S&P Investment Advisory Services** – Eight models from S&P's Model Allocation Portfolios (MAPs) ETF series.

In addition to the above, 11 new **BlackRock, LLC** (BlackRock) models from BlackRock Target Allocation series with varying increments of underlying equity and fixed income exposures have been added to the program, bringing the total number of BlackRock models on Managed360 to 20.

“We are focused on bringing our clients a diverse, yet select, menu of choices,” said Matthew Forester, chief investment officer at BNY Mellon's Lockwood. “We believe these highly competitive and well-rounded additions to our program will help financial professionals meet a broad range of investor needs through various market cycles.”

For more information on these new portfolios and Lockwood Advisors, please visit <https://www.lockwoodadvisors.com> (<https://www.lockwoodadvisors.com>).

¹Lockwood serves as the discretionary manager and, in that capacity, may change the assets, timing of portfolio changes, style and/or investment vehicle allocations within these portfolios at its discretion.

About BNY Mellon's Lockwood Advisors, Inc.

Lockwood Advisors, Inc. is a leading provider of managed account solutions. As a program sponsor, Lockwood offers access to some of the industry's leading investment managers, provides independent research on separate account managers, and develops advisory solutions to help investment professionals meet the diverse needs of their clients.

Lockwood also offers discretionary portfolio management solutions through financial institutions and independent registered investment advisers. Lockwood Advisors, Inc. is an investment adviser registered in the United States under the Investment Advisers Act of 1940, an affiliate of Pershing LLC and a wholly owned subsidiary of The Bank of New York Mellon Corporation (BNY Mellon).

About BNY Mellon's Pershing

BNY Mellon's Pershing and its affiliates provide advisors, broker-dealers, family offices, hedge fund and '40 Act fund managers, registered investment advisor firms and wealth managers with a broad suite of global financial business solutions. Many of the world's most sophisticated and successful financial services firms rely on Pershing for clearing and custody, investment and retirement solutions, technology, enterprise data management, trading services, prime brokerage and business consulting.

Pershing helps clients improve profitability and drive growth, create capacity and efficiency, attract and retain talent, and manage risk and regulation. With a network of 23 offices worldwide, Pershing provides business-to-business solutions to clients representing approximately 7 million investor accounts globally. Pershing LLC (member FINRA, NYSE, SIPC) is a BNY Mellon company. Additional information is available on [pershing.com](http://www.pershing.com) ([//www.pershing.com](http://www.pershing.com)), or follow us on Twitter @Pershing (<http://twitter.com/Pershing>). ([//www.pershing.com](http://www.pershing.com))

About BNY Mellon

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. As of June 30, 2018, BNY Mellon had \$33.6 trillion in assets under custody and/or administration, and \$1.8 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 ([//www.bnymellon.com](http://www.bnymellon.com)). Follow us on Twitter @BNYMellon (<http://twitter.com/BNYMellon>) or visit our newsroom at www.bnymellon.com/newsroom ([//www.bnymellon.com/newsroom](http://www.bnymellon.com/newsroom)) for the latest company news.

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