

**BNY Mellon Announces Partnership with CFA Institute to Develop Collaborative Research on Social Investing, Diversity and Inclusion**  
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**Agreement to focus on professional development of BNY Mellon employees**

NEW YORK, May 24, 2017 /PRNewswire/ -- BNY Mellon, a global leader in investment management and investment services, and CFA Institute, the global association of investment professionals, today announced a partnership with the shared goal of promoting the highest standards of professional excellence across the investment management industry. The partnership will expand professional development opportunities for BNY Mellon employees and allow for the development of collaborative research on social investing, as well as diversity and inclusion.

"We're pleased to partner with an organization that has continually demonstrated its commitment to promoting a framework of ethics, education, and professional excellence and maintaining its important role as a steward of the investment management profession," said Brian Shea, CEO of Investment Services and Vice Chairman of BNY Mellon. "This partnership formalizes our ongoing relationship with CFA Institute and reinforces BNY Mellon's objective to serve as an advocate for positive change and provide support to professionals who can contribute to an evolving financial marketplace."

For BNY Mellon, one benefit of the partnership is an increased focus on continuing professional education opportunities aligned with its business strategy. BNY Mellon already employs thousands of people participating in one or more of the programs administered by CFA Institute such as Chartered Financial Analyst (CFA), Certificate in Investment Performance Measurement (CIPM) and Investment Foundations, and this partnership reinforces its commitment to talent development. The parties will collaborate on important thought leadership development and research, particularly as it relates to advancing industry solutions around social investing, diversity and inclusion.

"BNY Mellon has been an active partner in the development of our professional education programs, industry best practices and thought leadership, and we recognize our collective ability to drive change in the industry," said Paul Smith, President and CEO of CFA Institute. "Thought leadership on critical topics such as diversity and social investing is an ideal complement to our Future of Finance initiative, and we look forward to a collaboration that will make a positive impact on the investment management profession."

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 March 31, 2017, BNY Mellon had \$30.6 trillion in assets under custody and/or administration, and \$1.7 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](http://www.bnymellon.com). Follow us on Twitter @BNYMellon or visit our newsroom at [www.bnymellon.com/newsroom](http://www.bnymellon.com/newsroom) for the latest company news.

CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organization is a champion for ethical behavior in investment markets and a respected source of knowledge in the global financial community. The end goal: to create an environment where investors' interests come first, markets function at their best, and economies grow. CFA Institute has over 148,000 members in 163 countries and territories, including 142,000 CFA charterholders, and 147 member societies. For more information, visit [www.cfainstitute.org](http://www.cfainstitute.org).

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