



Sample Automated Communications

What To Expect

You may receive various automated communications once your BNY Mellon | Pershing account(s) is/are opened and on an ongoing basis. See the following pages for more details on each type of communication.

Key Types of Communications:

- Welcome Kit
- BNY Mellon | Pershing online access
- eDelivery status
- Statement availability
- Account-related activities



SAMPLE: Welcome Kit

You will receive a
Welcome Kit via mail
with cover letter and
important disclosures.



Pershing Advisor Solutions LLC, a BNY Mellon company
Member FINRA, SIPC (877) 870-7230

ADAM BELLMER
ADAM BELLMER JT TEN
555 E WELLS STREET
MILWAUKEE, WI 53202-3835

Welcome and Thank You

March 10, 2022

Account Number: YAV-XXXX05

Relationship Manager: JOHNSON FINANCIAL GROUP

Thank you for opening an account at BNYM | Pershing through your Relationship Manager. Enclosed you will find important disclosures for the account. Please retain these documents for your files.

If you have any questions, please contact your Relationship Manager.

Thank you for your business.



SAMPLES: BNY Mellon | Pershing Online Access

Online Account Access: User ID Request Complete

You will receive an email to set up online access to BNY Mellon | Pershing's site. **Note:** You will only be able to view documents on this site.



For online access to view all of your wealth accounts, we encourage you to visit the Johnson Financial Group [website](#), and to rely upon this site for regular updates.

You may also access BNY Mellon | Pershing's website. Through their website, you will only be able to view documents related to your investment accounts custodied with them. If you are interested in setting up access to their site, please review the information below.

A new online user ID has been created. You will be required to enter the following user ID and complete the initial set-up as instructed.

User ID: XECC01Y

[Click Here](#) for online access. This link will expire in 30 days.

If you have any questions about this update, please contact your Johnson Financial Group advisor or our Customer Support Center at 888.769.3796 and select option 4.

Welcome to our Site!

If you set up online access to BNY Mellon | Pershing's site, you will receive an email confirmation upon successfully logging in.



This e-mail is to confirm that you have successfully logged in to the BNY Mellon | Pershing [website](#) to view documents for your account(s) managed by Johnson Financial Group.

As a reminder, we encourage you to log in directly to the Johnson Financial Group [website](#) to view your accounts, and to rely upon this site for regular updates.

If you have any questions about this update, please contact your Johnson Financial Group advisor or our Customer Support Center at 888.769.3796 and select option 4.



SAMPLES: BNY Mellon | Pershing Online Access

New Account Linked to your User ID

You will receive an email confirmation if a new account is linked to your online access.

Account Removed from your User ID

You will receive an email confirmation if an account is removed from your online access.



The account(s) listed below has/have been linked to your existing Johnson Financial Group online access.

Account(s) ending in: 123
456

Please log on to the Johnson Financial Group [website](#) to view all your accounts.

If you have any questions about this update, please contact your Johnson Financial Group advisor or our Customer Support Center at 888.769.3796 and select option 4.

In addition to the Johnson Financial Group [website](#), you may also view documents related to your accounts on BNY Mellon | Pershing's [website](#).



The account(s) listed below have/has been removed from your Johnson Financial Group online access.

Account(s) ending in: 123
456

Please log in to the Johnson Financial Group [website](#) to view all your accounts.

If you have any questions about this update, please contact your Johnson Financial Group advisor or our Customer Support Center at 888.769.3796 and select option 4.



SAMPLES: eDelivery Status

Electronic Delivery Enrollment

You will receive an email confirmation upon enrollment in edelivery.



You have successfully selected electronic delivery for the account(s) ending in the digits below.

Account(s) ending in: 412

A letter confirming the documents enrolled and the e-mail address will be sent to your mailing address to confirm this account(s) change.

Effective today, an e-mail notification will be sent to the e-mail address(es) associated with your account when a new account communication is available to view online.

To safeguard your information, only part of your account number will appear in each e-mail notification. You may log in to BNY Mellon | Pershing's [website](#) to change your document preferences at any time.

If you need assistance accessing your documents, please contact your Johnson Financial Group advisor or our Customer Support Center at 888.769.3796 and select option 4.

Electronic Delivery De-enrollment

You will receive an email confirmation if you de-enroll in edelivery.



You have successfully selected paper delivery for the account(s) ending in the digits below.

Account(s) ending in: 123
456

If you would like to add e-delivery, you may log in to BNY Mellon | Pershing's [website](#) to change your document preferences at any time. You may also contact your Johnson Financial Group advisor or our Customer Support Center at 888.769.3796 and select option 4.



SAMPLE: Statement Availability

Account Statement Notification

You will receive an email confirmation when a statement is available for your account(s).



A statement is now available for the account(s) ending in the digits below.

Account(s) ending in: 123
456

Please log in to the Johnson Financial Group [website](#) to view, download or print your statement.

If you need assistance accessing your documents, please contact your Johnson Financial Group advisor or our Customer Support Center at 888.769.3796 and select option 4.

In addition to the Johnson Financial Group [website](#), you may also view documents related to your accounts on BNY Mellon | Pershing's [website](#).



SAMPLE: Account-Related Activities

Retirement Tax Withholding Notice

You will receive an email confirmation for various account-related activities, like retirement tax withholding.



A Retirement Tax Withholding Notice is now available for the account(s) ending in the digits below.

Account(s) ending in: 816
626

Please log in to the Johnson Financial Group [website](#) to view, download or print your Retirement Tax Withholding Notice.

If you need assistance accessing your documents, please contact your Johnson Financial Group advisor or our Customer Support Center at 888.769.3796 and select option 4.

In addition to the Johnson Financial Group [website](#), you may also view documents related to your accounts on BNY Mellon | Pershing's [website](#).

