VISION

2019 Mid-Year Outlook: Navigating an Extended Cycle

Leo Grohowski

As we begin the second half of the year, what will the global economy and markets hold for investors?

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STRATEGY

Avoid the Pitfalls of Improper Asset Titling

A well-thought-out asset titling strategy can minimize your exposure to taxes and ensures that your wishes are carried out in the simplest and most efficient way possible.

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STRATEGY

Replay Our Quarterly Investment and Economic Webinar

Listen to the replay of our Quarterly Investment and Economic Webinar featuring Chief Investment Officer, Leo Grohowski, and a panel of investment experts. In this replay they discuss the heightened trade tensions, political uncertainty and how evidence of slowing global growth has reignited market volatility.

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The types of clients we serve and the services we offer

Individuals & Families

We specialize in meeting the complex investment and banking needs of wealthy individuals and their families.

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We offer a collaborative approach and customized solutions for our clients' other professional and financial advisors.

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Family Offices

Among the first of its kind in the nation, our Family Office services feature industry-leading resources and expertise for family offices and their financial interests.

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Non-Profits & Pensions

We offer a full range of investment, custody and reporting services tailored specifically to the needs of non-profits and pensions nationwide.

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Experience →

What to expect as our client

EXPERIENCE

A Client-First Culture

We do things a little differently at BNY Mellon Wealth Management. Here, we have a commitment to serving clients, not selling products–a client-first approach that has led to industry-leading client satisfaction rates.

And while we're proud of those results, it’s our client retention rates that matter most to us. Those sustained relationships can only be earned over time–and they’re what allow us to create not just richer lifetimes, but enduring legacies.

Research →

Our expertise at work

STRATEGY

"real wisdom" that leads to success.

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Mary's Story: Success Through Trusted Partnerships

Mary Meduski, President and CFO of Tierpoint and Cequel III, talks about the confidence necessary to start from scratch, find the right partner and make a difference in an industry.

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Bob's Story: Creating a Compelling Culture

Bob Shaw, former CEO and President of Netoptics, explains how an exciting, engaging corporate culture compelled his employees to excel and made his business grow at an unheard of rate.

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Our latest events and sponsorships

Outstanding in the Field: Persephone Farm Dinner

Jul 13
2019

Indianola, WA

BNY Mellon Wealth Management is thrilled to participate in an event hosted by Outstanding in the Field, the group that brings high-quality restaurant experiences to the outdoors. The culinary experience will take place at Persephone Farm, a beautiful setting with fresh flowers abound.

LEARN MORE

ACG Seattle Northwest Middle Market Growth Conference 2019

2019

Seattle, WA

BNY Mellon Wealth Management is a proud sponsor of the 2019 ACG Seattle Northwest Middle Market Growth Conference, which brings together M&A professionals from across the country for a day of business networking, learning opportunities and inspiration.

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CONTACT US

Want to learn more?

Whether you are an individual or part of a Family Office or Non-Profit organization, complete our quick contact form and we'll schedule a call to discuss your needs.

CONTACT US