



What Is EasyPay?

EasyPay enables your clients to transfer funds from their checking accounts to their brokerage accounts using interactive voice response (IVR) technology. Your clients simply need a touch-tone telephone to initiate transfers 24 hours a day, seven days a week.

The Features of EasyPay

- **Interactive Voice Response Technology.** Through IVR technology, EasyPay is a fast and easy method that your clients can use to pay for securities purchases and transfer funds for future investments—all via a touch-tone telephone.
- **Brokerage Account Statement Detail.** When your client uses EasyPay, his or her brokerage account statement will list all completed fund transfers to facilitate record keeping.

The Benefits of EasyPay

- **Simple Funds Transfer.** EasyPay is a user-friendly and convenient way for your clients to transfer funds from a checking account to a brokerage account without dealing with checks, stamps, or paperwork.
- **Fast Crediting.** In a three-day settlement environment, EasyPay is an ideal method of paying for a trade. If a payment is initiated before 1 p.m. on the second business day following a trade, your client's brokerage account will be credited prior to settlement.
- **Prompt Payment.** Clients can pay for securities purchases on a timely basis, thus avoiding interest charges.
- **Increased Security.** Eliminate the risk of losing checks through the mail.
- **No Transaction Fees.** EasyPay does not charge transaction fees. However, your client's bank may charge a transaction fee for processing each debit to his or her checking account.
- **Convenient Program Support.** To receive assistance, or to obtain a supply of EasyPay Enrollment forms, contact our Customer Assistance Center at (800) 603-3567, on weekdays from 8:30 a.m. to 6:30 p.m. (ET).

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