



Deposits to Pershing

Check Deposits

- Mail check deposits to: Pershing Advisor Solutions
One Pershing Plaza, 4th Floor
Jersey City, NJ 07399
- Must be made payable to Pershing, LLC or the account registration (i.e. John Smith, Smith Trust, John Smith IRA, etc.)
- Client's account number must be clearly written on each check.

ACH (electronic) Deposits

- If a link between your Pershing account and an outside bank has already been set up, you can contact SoundView Advisors to complete electronic deposits and/or withdrawals on your behalf. If you would like to set up an ACH link to an outside bank, please contact SoundView for appropriate paperwork.
- *This option is only available if you have a Corestone Account.* If you would like the ability to deposit cash online *without contacting SoundView*, we would encourage you to set up an ACH Transfer through your outside bank account, i.e. Bank of America, Chase, etc. Most banks will set up this sort of link and will probably need the following information to do so:

Institution: Bank of New York Mellon
Address: 1 Wall Street, New York, NY, 10286
Routing Number: 031100157
Account Number: xxxxxxxxx (at bottom of your Corestone check)

Inbound Wire Instructions

- Bank: The Bank of New York
- ABA #: 021000018
- Beneficiary: Pershing LLC
- Beneficiary A/C #: 890-051238-5
- Beneficiary Address: One Pershing Plaza, 4th Floor, Jersey City, NJ 07399
- Ultimate Beneficiary: Pershing Advisor Solutions LLC + Account (i.e. John's Individual)
- Ultimate Beneficiary A/C #: Pershing account number (QU******)



Withdrawals from Pershing

If you would like to make withdrawals from your Pershing account, there are three different ways to accomplish this.

1. Contact SoundView Advisors directly via email in order to request withdrawal of funds from your Pershing account. This includes outbound wires, ACH withdrawals, and check requests. Please note; paperwork may be required for initial setup.

The following two options are only available if you have a Corestone Account.

2. If you have a Corestone account, the Bill Suite tool is available for sending cash OUT of your account. If you are enrolled, this tool is available on NetXInvestor.
3. If you would like the ability to withdraw cash online without contacting SoundView, we would encourage you to set up an ACH Transfer through your outside bank account, i.e. Bank of America, Chase, etc. Most banks will set up this sort of link and will need the following information to do so:

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Address: 1 Wall Street, New York, NY, 10286

Routing Number: 031100157

Account Number: xxxxxxxxx (at bottom of your Corestone check)