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Risk Management, Asset Allocation, and Fundraising Key Topics at SEI's 2014 Nonprofit Client Symposium

65 Nonprofit Organizations Attend Three-Day Event on Investment Management

OAKS, PA -- (Marketwired) -- 06/26/14 -- More than 80 participants, representing 65 endowments and foundations from the U.S. and Canada, attended SEI's (NASDAQ: SEIC) 2014 Nonprofit Client Symposium, held June 18-20 at the company's headquarters in Oaks, PA. The goal of the conference was to facilitate meaningful conversations and provide expert insight on important industry topics such as spending and risk management strategies, asset allocation considerations, and fundraising challenges.

Investment experts provided clients with SEI's current economic outlook and marketplace point-of-view, along with new insights into alternative investment strategies. They also presented an in-depth overview of SEI's active investment approach and extensive manager research and selection process. In addition, SEI shared several case studies to illustrate advice and modeling solutions used to implement effective spending policies and risk management strategies. The Company demonstrated its proprietary modeling tool, explaining recent enhancements and how the tool is used to manage risk and test real-time implications of market events across client portfolios.

"SEI has a long track record of partnering with nonprofit organizations as an extension of their investment teams. We remain dedicated to providing our clients with innovative resources to meet their goals and achieve their missions," said Roger Messina, Vice President and Managing Director, Client Portfolio Management Team, SEI's Institutional Group. "Our exclusive client event proved beneficial in providing attendees with new approaches to investment and risk management, new tools to help grow their organizations, and valuable networking opportunities with one another."

The event's keynote address, "Uncharitable: How Restraints on Nonprofits Undermine Their Potential," was delivered by Dan Pallotta, best-selling author, Chief Humanity Officer of Advertising for Humanity, and Founder of the Charity Defense Council and Pallotta TeamWorks. Mr. Pallotta is widely known for creating the multi-day charitable event industry with the launch of the Breast Cancer 3-Day Walks and AIDS Rides. Mr. Pallotta discussed

the need for nonprofit organizations, regulators, and the public to change the way fundraising, administration, and overhead is viewed in order to maximize charitable causes.

"The things we've been taught to think about charity, about giving, and about being a nonprofit are actually undermining the causes we love and our desire to make a difference," said Mr. Pallotta during his presentation. "More than transforming the way the general public thinks about charity, more than investing in fundraising, we need our nonprofit organizations to embrace those wild-eyed dreams that got them into this work in the first place ... None of us want our epitaph to read 'we kept charity overhead low.' We want it to read that 'we changed the world.'"

SEI's Director of the Nonprofit Advisory Team, Mary Jane Bobyock, hosted a session highlighting recent trends in the nonprofit market. In regards to an interest in ESG investing, a real-time survey of attendees found that:

- Only 31 percent of participants have had a discussion about ESG investing with their investment committees; however, 77 percent said they would like more education on the topic
- 94 percent of attendees said their committee would likely be receptive to adding a "consideration" of ESG criteria into the Investment Policy Statement without requiring investment to be mandatory

In addition, guest speakers from the Impact Foundation and FundingLogic presented a "High Impact Fundraising Workshop," which provided tools for more effective fundraising techniques. Grantmakers for Effective Organizations presented "Eight Things Grantmakers Can Do to Boost Nonprofit Performance" and shared strategies that grantmakers can undertake to help improve grantee performance and results. SEI Legal Counsel, along with Morgan, Lewis and Bockius, discussed guidelines for effective board meetings and other practical tips for good governance in their presentation, "Board Governance: Fiduciary Duties in Practice."

About SEI's Institutional Group
SEI's Institutional Group is one of the first and largest global providers of outsourced fiduciary management investment services. The company began offering these services in 1992 and today acts as a fiduciary manager to more than 450 retirement, nonprofit and healthcare clients in seven different countries. Through a flexible model designed to help our clients achieve financial goals, we provide asset allocation advice and modeling, investment management, risk monitoring and stress testing, active liability-focused investing and integrated goals-based reporting. For more information visit: http://www.seic.com/institutions.

About SEI
SEI (NASDAQ: SEIC) is a leading global provider of investment processing, investment management, and investment operations solutions that help corporations, financial institutions, financial advisors, and ultra-high-net-worth families create and manage wealth. As of March 31, 2014, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages or administers $582 billion in mutual fund and pooled or separately managed assets, including $239 billion in assets under management and $343 billion in client assets under administration. For more information, visit www.seic.com.

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