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SEI Launches Enhancements to Advisor Technology Suite

Investor Portal Powers Personalized, Connected Experience for Advisors and their Clients

OAKS, Pa., Sept. 28, 2023 /PRNewswire/ -- SEI® (NASDAQ: SEIC) today announced the launch of enhanced technology capabilities in its Investor Portal, a white-labeled solution within SEI Connect that enables advisors to provide clients a full picture of their financial lives.

According to Cerulli Associates' "State of Wealth Management Technology 2023" report, e-signature and client portal are most frequently cited as positively impacting the client experience. Providing access to deeper insights and improving digital collaboration between an advisor and their clients, the Investor Portal and mobile app now feature a document vault to seamlessly upload personal documents, secure messaging to facilitate better collaboration, and account aggregation to connect investment, banking, and real estate accounts directly from other financial institutions.

Paul Klauder, Head of SEI's Advisor business, said:

"Market trends present a tremendous opportunity for us to help financial advisors succeed with flexible, client-responsive solutions that address their—and their clients'—needs. As the lines of all aspects of our financial lives continue to blur, the need for a connected experience becomes paramount, and we intentionally built and enhance these tools with the future in mind."

"Advisors continue to feel the pressure from investors for a digital, collaborative wealth management experience—especially in today's economic environment—while scaling their businesses for tomorrow. These enhancements within SEI Connect, including the Investor Portal, allow us to equip advisors with the tools they need to meaningfully engage with their clients, and in turn, help power growth, make confident decisions, and protect futures—for their clients and their businesses."

From accessibility, electronic delivery, and account aggregation to performance reporting, customization, and digital collaboration, SEI Connect provides a suite of front-office technology solutions—in addition to the Investor Portal—that help advisors scale their businesses, increase efficiency, and better serve their clients through a platform-based interactive hub on the SEI Wealth Platform℠. Other recent enhancements include:

- A multi-account opening process across the entire household for more efficient collaboration
- Expanded analytics to help give a more personal view into an investor's portfolio, including a risk return analysis report, security look through, and equity sector breakdown
- A simplified trading experience, including self-service limit orders
- A more efficient way to deposit money via digital deposit capabilities
- An enhanced digital platform to support SEI's advisor peer-to-peer communities

About SEI®

SEI (NASDAQ: SEIC) delivers technology and investment solutions that connect the financial services industry. With capabilities across investment processing, operations, and asset management, SEI works with corporations, financial institutions and professionals, and ultra-high-net-worth families to help drive growth, make confident decisions, and protect futures. As of June 30, 2023, SEI manages, advises, or administers approximately $1.3 trillion in assets. For more information, visit seic.com.

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