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SEI Quick Poll: Retirement Portfolios Look Solid, Yet Investors Still Shaking

1 in 3 Advisors Still Use Traditional, Single 60/40 Strategy for Retirement Portfolios

OAKS, PA -- (Marketwire) -- 04/05/12 -- The majority of financial advisors say their clients' retirement portfolios are nearly recovered from a dollar amount, but that "the psychological scars run deep," according to an SEI (NASDAQ: SEIC) Quick Poll released today. When it comes to managing these retirement portfolios, one-third of advisors still use a "traditional, single 60/40 portfolio" as the primary strategy. The survey was completed in March by more than 200 advisors during a webinar hosted by SEI about new approaches to retirement strategies. A replay of the webinar is available [here](#).

"The old mantra for retirement investing was, 'Income, income, income.' In reality, that's far too simplistic," said [Steve Onofrio](#), Managing Director, [SEI Advisor Network](#). "Instead, investors may have multiple goals -- income, growth, and capital preservation -- that are mirrored by a goals-based portfolio, in which separate pools of assets are aligned to each objective. We believe this approach to be an effective means of managing market volatility while ensuring that goals are met."

While the majority of advisors say their clients' retirement portfolios have largely recovered, 10 percent say their portfolios are in "better shape now than they were before the recession"; 10 percent say their clients' portfolios are "still playing catch-up." Though one-third of advisors primarily use a single 60/40 strategy for retirement portfolios, more than half (54 percent) use "bucketing" and 12 percent use annuities.

Of advisors' "graying boomer" clients, the topics most worrisome to them are suffering another significant stock market decline (60 percent) or "how much income they need for retirement" (28 percent). Other topics weigh less heavily on their minds. Only 10 percent of advisors say their clients are most worried about the impact of inflation eroding their savings (7 percent) or making bad investment decisions (3 percent).

"Despite the market rebound, investors today are still focused on what could go wrong," said Jaime Fukumae of Fukumae & Saman, LLC from Lafayette, California. "With that in mind, advisors need to create an open dialogue with clients, up front, and discuss risk in context of their retirement goals -- not just absolute returns and benchmarks. Retirement planning in tough economic times can be difficult, but if advisors establish open lines of communication,

clients won't panic during the rough patches. If that is accomplished, it is possible for clients to still attain multiple goals during their retirement years and reach their own definition of success."

To learn more about the SEI Advisor Network, please visit www.seic.com/advisors.

About The SEI Advisor Network

The SEI Advisor Network provides financial advisors with turnkey wealth management services through outsourced investment strategies, administration and technology platforms, and practice management programs. It is through these services that SEI helps advisors save time, grow revenues, and differentiate themselves in the market. With a history of financial strength, stability, and transparency, the SEI Advisor Network has been serving the independent financial advisor market for more than 16 years, has more than 4,900 advisors who work with SEI, and \$30.4 billion in advisors' assets under management (as of Dec. 31, 2011). The SEI Advisor Network is a strategic business unit of SEI. For more information, visit www.seic.com/advisors.

About SEI

SEI (NASDAQ: SEIC) is a leading global provider of investment processing, fund processing, and investment management business outsourcing solutions that help corporations, financial institutions, financial advisors, and ultra-high-net-worth families create and manage wealth. As of December 31, 2011, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages or administers \$404 billion in mutual fund and pooled or separately managed assets, including \$172 billion in assets under management and \$232 billion in client assets under administration. For more information, visit www.seic.com.

Source: SEI