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SEI Brings Goals-Based Investing to Canada

Worldsource Financial Management, One of Canada's Largest Independent Dealers, First to Enter Dealer Agreement

TORONTO -- (Marketwire) -- 05/08/12 -- [SEI](#) (NASDAQ: SEIC) today announced the launch of eight goals-based portfolios for Canadian investors. Goals-based investing allows individuals to address their unique financial needs, desires, and time horizons in a way that helps them look beyond intermittent market volatility. This approach promotes positive investor behaviour and can increase the odds that investors will achieve their personal financial goals.

The offering is based on SEI's pioneering research and innovation that brings together the concepts of modern portfolio theory and behavioural finance. Investors in the U.S. and the U.K. have benefitted from SEI's goals-based investment solutions for nearly a decade -- SEI's goals-based assets under management total roughly \$9 billion globally.

"Goals-based investment portfolios are designed to help advisors change the conversations they have with their clients," said [Kevin Barr](#), Head of the Investment Management Unit at SEI. "Instead of wondering if they're beating the index or their neighbour's portfolio, investors ask if they are on track to meet their goals. Less benchmarking can help investors stick with their long-term plans, with an eye on the goal ahead. After all, that's what is most important to us all -- reaching our personal financial goals."

The portfolios fall into two groups: stability-focused and growth-focused. The stability-focused portfolios are designed for investors who need to protect against losses, while maintaining a comfortable level of growth. The growth-focused portfolios are designed for investors who need to steadily accumulate assets at a rate consistent with their appetite for risk.

In conjunction with the launch of the portfolios, SEI also announced its first dealer agreement with Worldsource Financial Management, bringing together SEI's asset management capabilities and Worldsource's network of financial advisors across Canada. Brent Wilkins, Head of Asset Management Distribution in Canada, said, "SEI has significant experience working successfully with advisors globally and we are pleased to be working with Worldsource, as they are the first firm to use SEI's goals-based portfolios in Canada. Together, we can help advisors better serve their clients."

Andy Mitchell, President of Worldsource Financial Management, said, "In response to on-going advisor demand we are always seeking innovative portfolio solutions for our advisors and their clients. SEI is able to provide this groundbreaking investment solution to our clients. Their investment philosophy, understanding of the end investor and experience in providing outsourced solutions to wealth managers around the world makes them a valuable partner."

For more information about goals-based investing, please visit www.seic.com/GoalsBased.

About SEI Canada

SEI founded its Canadian business in 1994 with an office in Toronto and sales offices across the country. SEI's manager-of-managers approach provides multi-manager, globally diversified strategies with an appropriate home-country bias for Canadian investors. The SEI Target Date Funds and SEI Asset Allocation Funds are available to institutional investors including pension plans and nonprofit organizations. The SEI Asset Allocation Funds and Portfolios are available to retail investors through select dealer relationships. For more information, visit www.seic.ca.

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 March 31, 2012, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages or administers US\$428 billion in mutual fund and pooled or separately managed assets, including US\$189 billion in assets under management and US\$239 billion in client assets under administration. For more information, visit www.seic.com.

About Worldsource

Worldsource Financial Management is a division of Worldsource Wealth Management Inc., a fully integrated wealth management company that is focused on building financial prosperity. Worldsource Wealth Management Inc. is a fully owned subsidiary of Guardian Capital Group Limited. Guardian Capital Group Limited is a diversified financial services firm which serves the needs of a range of clients. For more information, visit www.worldsourcefinancial.com.

SEI Investments Canada Company is the Manager of the SEI Funds in Canada, and a wholly owned subsidiary of SEI Investments Company. For more information about SEI and the SEI Family of Mutual Funds, visit www.seic.ca. Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. The information contained herein is for general information purposes only and is not intended to provide investment advice nor an opinion regarding the appropriateness of any investment. Please read the prospectus carefully before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

SEI Contact:

Dana Grosser

SEI

+1 610-676-2459

dgrosser@seic.com

Media Contact:

Mary Warner

Hill + Knowlton Strategies

+1 416-413-4761

mary.warner@hkstrategies.ca

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