

March 3, 2015



SEI Advisor Network Achieves Second Consecutive Year of Record Growth

Increase in New Advisors, Cash Flow Mark Unprecedented Growth Period

OAKS, PA -- (Marketwired) -- 03/03/15 -- [SEI](#) (NASDAQ: SEIC) today announced that the [SEI Advisor Network](#) achieved record growth for the second consecutive year, totaling approximately \$10 billion in gross cash flow in 2014. The number represents a 10 percent increase over 2013 and 40 percent growth compared to 2012. The growth was sparked by a record 603 new advisors that contributed \$2.9 billion in gross cash flow. The record numbers continue an impressive five-year run for the Advisor Network, as the company continues to assert itself as a leader in the increasingly competitive advisor market.

"Our strong growth reflects our focus on quality and expanding the value we provide to advisors in every aspect of their businesses," said [Wayne Withrow](#), Executive Vice President and [SEI Advisor Network](#) Business Unit Leader. "We face a lot of tough competition in the advisor market, but we continue to work tirelessly to create a more streamlined environment for both new and existing advisors so they can focus on providing more value to their clients. The SEI Advisor Network continued to improve its platform in 2014 and we're in a good position for an even better 2015."

In 2014, the SEI Advisor Network launched several initiatives designed to differentiate advisors from their competition and grow their practices. Through a partnership with Redtail Technology, ActiFi, and MoneyGuidePro, SEI developed the first fully integrated and automated workflow solution that combined a CRM system, financial planning tool, and custodial platform in one seamless package. To give advisors solutions to address growing investor demand, SEI created five low-cost, tax-managed ETF strategies that span the risk-return spectrum. With succession planning identified as a key need for advisors, SEI also formalized the Business Pathfinder Program, a joint effort with SEI, FP Transitions, and The Bancorp designed to better prepare advisors for succession.

SEI will continue to develop those programs in 2015, while addressing evolving issues for advisors in the [practice management](#), investing, and technology sides of the business. SEI recently released the whitepaper "The Next Wave of Financial Planning" to offer effective practice management strategies for advisors trying to compete in the changing marketplace. SEI also launched the Advisor Tax Planning Academy as an educational course curriculum and set of resources for minimizing taxes on investment returns.

To learn more about the SEI Advisor Network, please visit 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 20 years, has over 6,100 advisors who work with SEI, and \$47 billion in advisors' assets under management (as of December 31, 2014). The SEI Advisor Network is a strategic business unit of SEI. For more information, visit seic.com/advisors.

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 December 31, 2014, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages or administers \$625 billion in mutual fund and pooled or separately managed assets, including \$253 billion in assets under management and \$372 billion in client assets under administration. For more information, visit seic.com.

Company Contact:

Dana Grosser
SEI
+1 610-676-2459
dgrosser@seic.com

Media Contact:

Jason Rocker
Braithwaite Communications
+1 215-564-3200 x110
jrocker@gobraithwaite.com

Source: SEI