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SEI’s Client Symposium Provides Guidance on Non-profit Management and Investments

Topics at Forum Included Board Governance, Investing in Private Markets And Broad Economic Themes

OAKS, Pa., July 13, 2017 (GLOBE NEWSWIRE) -- More than 90 participants, representing 53 endowments and foundations from the U.S. and Canada, attended SEI’s (NASDAQ:SEIC) “Growth Gathering,” a symposium for the company’s non-profit clients. The event was held from June 12-14 at the company’s headquarters in Oaks, PA. The goal of the conference was to be a forum for discussion among peers on emerging topics of increasing importance to nonprofit organizations, such as board governance, fundraising and evaluation of grant making. Additionally, investment experts provided participants with SEI’s current economic outlook, marketplace point-of-view, new insights into investment opportunities in private markets and discretion on asset allocation.

“SEI has a long history of partnering with a range of non-profit organizations and providing innovative and proprietary technology to help successfully achieve their mission,” said Roger P. Messina, Vice President and Managing Director, Client Portfolio Management Team, SEI’s Institutional Group. “For more than 25 years, SEI has had a dedicated effort in the non-profit sector enabling us to be at the forefront in providing attendees with fresh thinking on investment management and trends impacting their organizations.”

The event featured keynote speaker Alison Levine, mountaineer, explorer, author, business woman and philanthropist. Ms. Levine authored The New York Times best-selling book, “On the Edge,” asserting that principles applicable in extreme adventure also apply to demanding business environments. Her inspirational speech detailed her learnings from climbing the world’s tallest mountains.

“When you are going to try really hard things, push yourselves far outside your comfort zone and set ridiculously high goals, you’re going to have to give yourselves and your teams the freedom to fail,” said Ms. Levine during her presentation. “Just come back from it better the next time around.”

Additional speakers at the symposium included:

- Laura Solomon, founder of Laura Solomon & Associates, a firm serving as general counsel to hundreds of nonprofit organizations. Ms. Solomon presented "*What You Need to Know about Your Fiduciary Responsibilities,"* which outlined specific areas of fiduciary accountability for non-profit executives and Board members.
- Scott Holdman, Director of Operations and Innovation, Impact Foundation, hosted a session on high impact fundraising, equipping attendees with ways to maximize their ability to raise funds.
- Wendy McClanahan and Meridith Polin from McClanahan Associates, Inc., a professional evaluation firm servicing non-profits, presented "Making 'Cents' of Evaluation: Building a Strategy to Understand and Document Your Impact," which helped non-profit leaders gain a basic understanding of impact measurement and how it can help fulfill their mission.
- Mary Jane Bobyock, SEI's Director of the Non-profit Advisory Team, moderated a panel discussion featuring four non-profit attendees who shared case studies to illustrate their experiences in overseeing their endowments.

In addition, senior portfolio managers from SEI's equity, fixed income and alternative investment teams gave clients their analysis of recent market events and areas of potential opportunity for 2017. They provided insight into SEI's approach to active portfolio management, risk management and guidance on organizations' fiduciary responsibilities.

The event took place at SEI's global headquarters, a 90-acre campus just outside of Philadelphia. As part of the agenda, attendees were also provided access to SEI's recently opened IdeaFarm, a centuries-old farmhouse renovated into an innovation space.

About SEI's Institutional Group
SEI's Institutional Group is one of the first and largest global providers of outsourced investment management services. The company delivers integrated retirement, healthcare and non-profit solutions to more than 475 clients in 13 countries. Our solutions are designed to help clients meet financial objectives, reduce business risk and fulfill their due diligence requirements through implemented strategies for the management of defined benefit plans, defined contribution plans, endowments, foundations and board designated funds. For more information visit: 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, 2017, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages, advises or administers $779 billion in hedge, private equity, mutual fund and pooled or separately managed assets, including $297 billion in assets under management and $478 billion in client assets under administration. For more information, visit seic.com.

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