

June 28, 2018



## **SEI Client Symposium Focuses on the Future of Institutional Investing**

### **Event Provides Outlook on Investing and Retirement to Corporate and Healthcare Institutions**

OAKS, Pa., June 28, 2018 /PRNewswire/ -- SEI (NASDAQ:SEIC) hosted over 70 attendees at its "Navigating the Future" client symposium on June 11-13. The conference brought together the company's corporate and healthcare defined contribution (DC) and defined benefit (DB) plan sponsor clients for SEI's senior portfolio managers' insights into the latest investment strategies, discussions on the future of the retirement landscape, and networking opportunities with industry peers.

Corporate clients attended sessions on implementing investment risk management strategies, maximizing plan returns and understanding the benefits of discretionary investment management. Clients also gained further knowledge of SEI's investment process, potential impacts of tax reform, and encouraging participant and committee behaviors that lead to better retirement outcomes.

Healthcare clients and experts from credit rating agencies, including S&P, Moody's and Fitch, participated in a roundtable discussion, providing perspectives on the growing use of alternative investments in organizations' portfolios, effects of the changing regulatory landscape, and recent changes to rating criteria. A panel featuring two SEI healthcare clients, Firelands Regional Medical Center and Lee Health, focused on managing complex balance sheet assets, debt covenants, capital allocation strategies, as well as the implementation of SEI's enterprise risk management approach.

"The money management landscape for corporate and healthcare institutions is increasingly complex, and driven by a number of factors – from volatile equity markets to regulatory changes," said Roger P. Messina, Vice President and Managing Director, Client Portfolio Management Team, SEI's Institutional Group. "We have been working with corporate and healthcare clients and refining our strategy for more than 25 years. These client symposiums give us an opportunity to share ideas and expertise we have gained in managing investments for institutions through various market cycles."

The event featured two keynote speakers: Katy Milkman, Associate Professor at the University of Pennsylvania's Wharton School and expert in behavioral economics, and Alison Levine, mountaineer, explorer, author, business woman and philanthropist.

Milkman discussed people's approach to decision-making and how leveraging disciplines, such as behavioral economics, can help investment committee members avoid biases and develop strategies that motivate better decision-making.

In her second SEI client symposium appearance, Levine presented "Peakonomics: Success Strategies from the Seven Summits," which explored how to best react to uncontrollable environments and how principles that lead to success in the world of extreme adventure also apply to everyday settings – in both business and life.

The conference also featured panels of SEI investment professionals on a variety of issues, including:

- **Navigating the Retirement Path Ahead:** Participants evaluated the need for a new approach to building and managing investment line-ups for defined contribution plans, as well as sophisticated LDI tools for the defined benefit plan.
- **Committee Dynamics and Decision-Making:** Panelists discussed the importance of managing committee dynamics to achieve organizational and financial goals, including the establishment of sound governance processes and fiduciary responsibility.
- **Institutional Investing—What's Trending?:** Experts examined views on active vs. passive investing and other innovative investment strategies, such as factor-based investing and World Select Equity strategies.

Attendees also heard more information on SEI's economic outlook for the remainder of 2018 and were presented with a showcase of the company's investment management technology. The event was held at SEI's global headquarters, a 96-acre campus just outside of Philadelphia in Oaks, PA.

### **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 nonprofit solutions to more than 480 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/institutional-investors](http://seic.com/institutional-investors).

### **About SEI**

Now in its 50th year of business, 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, 2018, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages, advises or administers \$869 billion in hedge, private equity, mutual fund and pooled or separately managed assets, including \$335 billion in assets under management and \$530 billion in client assets under administration. For more information, visit [seic.com](http://seic.com).

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