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## SEI Establishes Exclusive Agreement with Inovea Group

### SEI Expands Global Footprint and Introduces Goals-based Investing in France

OAKS, Pa., Feb. 7, 2019 /PRNewswire/ -- SEI (NASDAQ: SEIC) today announced a strategic partnership with Inovéa, a France-based, independent network of advisers and consultants specializing in insurance, real estate and finance products. Through this relationship, SEI launched and is managing six new European Strategic Portfolios (Euro SPs), each designed with a goals-based investment strategy. Inovéa will utilize SEI GoalPortal®, a bespoke technology solution, and be the exclusive provider of SEI's end-to-end goals-based process to the retail adviser market in France. This news was previously announced on SEI's fourth-quarter 2018 earnings call.

"We are thrilled to work with Inovéa to provide a customized solution that begins with truly understanding their clients' unique, interdependent needs and goals – financially and emotionally," said Kevin Barr, Executive Vice President and Head of SEI's Investment Management Unit and Asset Management Distribution Team. "As the first and only to offer our goals-based solution in France, Inovéa will utilize our process, investment strategy and technology to fundamentally change the way their advisers do business today."

Inovéa will deepen its client relationships and evolve its advisory practice with the following:

- **Discovery** – SEI GoalPortal drives its proprietary discovery process, which organizes a comprehensive list of prioritized financial and life events, identifies risk exposure, and helps shape a client's financial plan. GoalPortal features the award-winning SEI Discovery Board, a core instrument in helping individuals and families to articulate and prioritize their goals. SEI created a French version of GoalPortal, which is unique to Inovéa.
- **Proposals and Reporting** – GoalPortal enables Inovéa to create custom, client-ready proposals and progress-to-goals reports, which monitor clients' progress towards tangible and personal goals.
- **Euro SPs** – SEI designed a series of UCITS sub-funds, which are contained within SEI's Global Assets Fund, domiciled in Ireland, and registered for retail sale in France with the Autorité des Marchés Financiers under the UCITS EU passporting regime.

- **Training** – SEI collaborated with Inovéa to execute a series of full-day training programs that transitioned and aligned Inovéa's business model with SEI's goals-based solution. More than 450 advisers participated in the training, which launched in five locations throughout France and the Caribbean over the course of one month.

"Offering SEI's goals-based approach and process as our sole solution will differentiate us, as we will be the only firm creating a lasting, intimate client experience while aligning investment strategies to our clients' goals," said Marc Rosticher, Co-Founder of Inovéa. "SEI's dynamic solution will enable our advisers to engage our clients in an easy-to-use, interactive and collaborative process, as well as build client confidence that we are constructing portfolios that deliver on their future goals. We look forward to working with SEI to support our growth journey and gain a competitive advantage in our market."

SEI's goals-based client process provides advisers insight into the financial and non-financial aspects of their clients' lives and enables them to uncover opportunities to offer clear, actionable and personalized advice. This process allows clients to communicate their concerns and goals, and advisers can customize portfolios that accommodate risk tolerance, maximize their ability to meet clients' goals, and report meaningful and understandable financial insight for their clients. In addition to Inovéa, two other global SEI clients use GoalPortal to help end-investors identify and meet their investment needs and aspirations.

### **About SEI's Asset Management Distribution Team**

SEI's Asset Management Distribution Team provides customized strategic partnerships enabling open-architecture investment solutions aligned to end-investors' goals, supporting leading financial service intermediaries globally. The group helps large distributors in North America, Europe and Asia implement a goals-based advice framework that combines the behavioral finance approach pioneered by SEI with the client's proprietary advice platform to create a distinct end-client offering. SEI's Asset Management Distribution Team is a part of the Private Banking business unit of SEI. For more information, visit [seic.com/amd](https://seic.com/amd).

### **About SEI**

After 50 years in business, SEI (NASDAQ:SEIC) remains 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 Dec. 31, 2018, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages, advises or administers \$884 billion in hedge, private equity, mutual fund and pooled or separately managed assets, including \$307 billion in assets under management and \$573 billion in client assets under administration. For more information, visit [seic.com](https://seic.com).

### **About Inovéa**

Created by wealth management and relationship marketing professionals and based in France, Inovéa is an independent network of auditors and consultants, who are given the opportunity to become partners and participate in the company's development. The Inovéa Group has four specialized subsidiaries in insurance, products, real estate and financing, offering the best legacy solutions from major market players. The Filianse Program meets new market expectations as the first financial education program for families.

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