

June 1, 2020



# **SEI Launches the SEI American Funds Strategies for Independent Advisors**

## **New Offering Brings Additional Flexibility to SEI's Customizable Investment Platform**

OAKS, Pa., June 1, 2020 /PRNewswire/ -- SEI (NASDAQ: SEIC) today announced the launch of the [SEI American Funds® Strategies](#), built specifically for independent advisors leveraging the SEI Wealth Platform<sup>SM</sup>. Offered by Independent Advisor Solutions by SEI, these six strategies are built with American Funds by Capital Group® to provide greater flexibility and help empower advisors to meet their clients' investment goals.

"The addition of the SEI American Funds Strategies highlights our customizable platform and the flexible investment solutions we offer advisors to design the right portfolios to help their clients meet their investment goals," said Wayne Withrow, Head of Independent Advisor Solutions. "We believe that focusing on long-term achievement, rather than short-term performance, is a critical component of an effective financial plan. We have long advocated for the merits of goals-based wealth management because we believe a client's life goals should define their investment goals."

### **SEI American Funds Strategies:**

- Are designed, constructed and maintained by SEI's Investment Management Unit<sup>1</sup> based upon the company's asset allocation philosophy.
- Are built with a core of American Funds by Capital Group using its low-cost, F3 share class.
- Support a goals-based wealth management approach and align with growth-, stability- and income-focused goals.
- Benefit from the safety and security of assets being held within SEI Private Trust Company.

"Our commitment, resources and insights to help advisors build better portfolios coupled with financial advice from a client's advisor is an important combination for clients to reach their long-term financial goals," said Bill Brady, senior vice president and head of wealth management distribution, Capital Group. "We are pleased to work with SEI to bring to market these six strategies that leverage the industry experience and innovation of both companies."

The SEI American Funds Strategies span a broad risk-return spectrum, allowing investors to seek different targeted levels of returns commensurate with different targeted levels of risk and apply a strategic asset allocation that is based upon long-term capital market assumptions. Making use of a full complement of American Funds built by SEI Investments Management Corporation, the strategies seek to provide a high level of diversification across a variety of asset classes. Although the strategies generally select from the American Funds, money market fund allocations within the portfolio may be allocated to one or more mutual funds from SEI's family of mutual funds.

<sup>1</sup>SEI's Investment Management Unit is a team within SEI Investments Management Corporation (SIMC), which serves as investment advisor.

SIMC is the manager of the SEI American Funds Strategies. As such, SIMC is solely responsible for the fund selection and portfolio construction of the Strategies. Please see SIMC's Form ADV Part 2A (or the appropriate wrap brochure) for a full disclosure of the fee schedule.

Custody services provided by SEI Private Trust Company (SPTC), a federally chartered limited purpose savings association. SIMC and SPTC are wholly owned subsidiaries of SEI Investments Company.

### **About Independent Advisor Solutions by SEI**

Independent Advisor Solutions by SEI provides independent financial advisors with wealth management services through outsourced investment strategies, administration and technology services, 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, Independent Advisor Solutions has been serving the independent financial advisor market for more than 25 years, has 7,600 advisors who work with SEI, and \$60.8 billion in advisors' assets under management (as of March 31, 2020). Independent Advisor Solutions is a strategic business unit of SEI. For more information, visit [seic.com/advisors](http://seic.com/advisors).

### **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 March 31, 2020, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages, advises or administers \$920 billion in hedge, private equity, mutual fund and pooled or separately managed assets, including \$283 billion in assets under management and \$632 billion in client assets under administration. For more information, visit [seic.com](http://seic.com).

### **About Capital Group**

Since 1931, Capital Group, home of the American Funds<sup>®</sup>, has been singularly focused on delivering superior results for long-term investors using high-conviction portfolios, rigorous research and individual accountability. As of March 31, 2020, Capital Group manages more than \$1.7 trillion in equity and fixed income assets for millions of individual and institutional investors around the world.

The Capital Group companies manage equity assets through three investment groups. These groups make investment and proxy voting decisions independently. Fixed income investment professionals provide fixed income research and investment management across the Capital organization; however, for securities with equity characteristics, they act solely on behalf of one of the three equity investment groups.

Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

**Company Contact:**

Leslie Wojcik

SEI

+1 610-676-4191

[lwojcik@seic.com](mailto:lwojcik@seic.com)

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