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SEI American Funds Strategies Expands with U.S.-Focused Offerings

Strategic Partnership with Capital Group Enhances Investment Personalization

OAKS, Pa., June 30, 2021 /PRNewswire/ -- SEI (NASDAQ: SEIC) today announced the expansion of its strategic partnership with Capital Group[®], home of American Funds[®], adding U.S.-focused strategies to the SEI American Funds[®] Strategies family. The new solutions provide greater investment flexibility for independent advisors through the SEI Wealth PlatformSM (Platform).

"Advisors are experiencing a paradigmatic shift as clients increasingly seek transparent, personalized solutions to achieve their investment goals," said J. Womack, Managing Director of Investment Products and Services for Independent Advisor Solutions by SEI. "We're excited to enhance the SEI American Funds Strategies, pairing Capital Groups' goals-based investment approach with our investment philosophy and end-to-end advisor technology Platform. The seamless delivery of multi-asset solutions with technology provides greater control for our clients pursuing investors' evolving financial goals."

Complementing the existing global-oriented line-up, the expansion includes new solutions that emphasize allocations to U.S. companies across risk tolerances and common investment objectives, including growth, stability and income. Together, they allow advisors to choose between U.S.-focused and global exposures in order to more effectively help achieve clients' financial goals.

"We are delighted to extend our strategic partnership with SEI and grow the SEI American Funds Strategies family in order to continue helping improve people's lives through successful investing," said Bill Brady, Senior Vice President and Head of Wealth Management Distribution at Capital Group. "These strategies, which are grounded in our shared organizational values and core belief in a long-term, goals-based approach to investing, provide valuable options for financial professionals and their clients across the risk spectrum."

[Launched in June 2020](#), the SEI American Funds Strategies support a transparent and cost-effective goals-based wealth management approach, offering broad diversification across a variety of asset classes. They use a core selection of American Funds accessed through

low-cost F-3 shares and are securely held in the SEI Private Trust Company. With SEI's Investment Management Unit's¹ investment oversight and asset allocation approach, as well as American Funds' objectives-based mutual funds, the portfolios provide scale and efficiency for advisors guiding their clients in the pursuit of their financial goals.

¹*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.

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 (SEI).

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 7,500 advisors who work with SEI, and \$77.4 billion in advisors' assets under management (as of March 31, 2021). Independent Advisor Solutions is a strategic business unit of SEI. For more information, visit 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 designed to help corporations, financial institutions, financial advisors, and ultra-high-net-worth families create and manage wealth. As of March 31, 2021, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages, advises or administers approximately \$1 trillion in hedge, private equity, mutual fund and pooled or separately managed assets, including approximately \$384 billion in assets under management and \$836 billion in client assets under administration. For more information, visit seic.com.

About Capital Group

Celebrating its 90th anniversary in 2021, Capital Group, home of the American Funds, has been singularly focused on delivering superior results for long-term investors using high-conviction portfolios, rigorous research and individual accountability since 1931. As of December 31, 2020, Capital Group manages more than \$2.3 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.

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