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SEI Expands Technology Offering with Wealthbox

Strategic Partnership Provides Advisors Integrated Technology Ecosystem for Client Engagement and Business Growth

OAKS, Pa., July 28, 2021 /PRNewswire/ -- SEI (NASDAQ: SEIC) today announced a strategic partnership and technology integration with Wealthbox, a client relationship management (CRM) software service designed specifically for financial advisors. Wealthbox joins the nearly 50 technology integrations and strategic partnerships available to independent advisors using the SEI Wealth Platform^{SM}.

"As investors increasingly demand personalization, including flexible investment options, advice and support, it's essential that advisors are armed with a simple, modern and powerful CRM to serve as the client hub for driving the investor experience," said Allie Carey, Managing Director of Digital Experience & Collaboration for SEI's advisor business. "We are thrilled to integrate Wealthbox into the SEI Wealth Platform, our end-to-end, transformative technology solution that provides advisors their preferred tools, positions them for growth and empowers them to more effectively and efficiently help clients achieve their financial goals."

Through the integration, advisors can seamlessly view client profiles, account details and investment positions in the SEI Wealth Platform through single sign-on via Wealthbox. Key features include:

- **Contact management** with an easy-to-view layout and note-taking interface to track interactions and financial information
- **Social profile** inclusion to monitor and engage prospects and clients on priority social platforms
- **Automated and customizable workflows** to streamline client and prospect interactions
- **Mobile application** fully synced with a web-based account for on-the-go access to account information

"We are delighted to partner with SEI to offer their clients our comprehensive and innovative CRM," said John Rourke, CEO of Wealthbox. "Our integration reflects our shared commitment to leverage advanced technology to help advisors manage their client relationships with greater ease and efficiency."

About Independent Advisor Solutions by SEI
Independent Advisor Solutions by SEI delivers technology and investment solutions that provide a unified, digital wealth management experience for independent financial advisors and their clients. The integration of technology, investment flexibility, custody services and practice management tools connects advisors to their clients and empowers confident decision-making for their financial futures. A strategic business unit of SEI and serving the independent financial advisor market for nearly 30 years, Independent Advisor Solutions works with over 7,500 advisors and supports approximately $95.2 billion in advisors' total platform assets[1], which includes $81.6 billion in assets under management (as of June 30, 2021). For more information, visit seic.com/advisors.

[1]$13.6 billion in platform assets represents third-party assets held in custody accounts at SEI Private Trust Company.

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 June 30, 2021, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages, advises or administers approximately $1.3 trillion in hedge, private equity, mutual fund and pooled or separately managed assets, including approximately $399 billion in assets under management and $880 billion in client assets under administration. For more information, visit seic.com.

About Wealthbox
Wealthbox is a leading CRM software application that helps financial advisors manage their clients and collaborate as a team. Integrated with custodial platforms and complementary wealth-tech products, Wealthbox's modern product design offers simplicity in the user experience that's combined with powerful CRM features. Wealth management firms, advisor networks, and broker-dealers use Wealthbox to help them serve clients, streamline operations, and grow their businesses. Wealthbox is owned by Starburst Labs, Inc. Learn more at www.wealthbox.com.

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