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SEI Enhances Advisor Technology Platform and Advances Cloud Transformation

New Applications Help Streamline Client Experience, Improve Transparency and Personalize Investment Allocations

OAKS, Pa., Jan. 5, 2022 /PRNewswire/ -- SEI® (NASDAQ:SEIC) today announced the launch of Digital Account Open and Digital Model Management, two key technology enhancements available to independent advisors through the SEI Wealth Platform℠.

Digital Account Open simplifies opening a new client account, expanding SEI's current electronic onboarding and eSignature process with an end-to-end, easy-to-use new tool. The technology is built to eliminate the traditional paper-based process and enables advisors to open client accounts entirely digitally. Features include:

- An intuitive, step-by-step workflow to guide the input process
- Adaptable onboarding, from launch to collecting an eSignature, and the ability to pause and save progress or assign responsibility to other authorized team members
- An integrated process to catch input mistakes and help avoid "not in good order" submissions
- A cohesive dashboard with pending accounts, work in progress, and relevant status and dollar values

Digital Model Management provides a fully-digital way for advisors to deploy and interact with client portfolios, all in a unified managed account framework. The cloud-native application allows advisors to personalize client portfolios in accordance with their financial goals, risk tolerance, tax and fee preferences, and more. Features include:

- An easy-to-navigate dashboard for creating and adjusting investment models across all types of investment strategies, including mutual funds, ETFs, and separately managed accounts (SMAs)*
- Smart workflows with an intuitive setup that follows the relevant steps for each investment change
- A digital interface featuring an all-in-one overview of any investment change's impact on cost, risk, asset allocation, rebalancing settings, and tax needs

Erich Holland, Executive Managing Director of Client Engagement for SEI's advisor business, said:

"We are excited to continue our cloud transformation and enhance our technology platform with two cutting-edge tools that streamline how independent advisors deliver wealth management advice to their clients. These fully-digital, integrated solutions simplify and expedite the account open process and power customized portfolio implementation. With them, advisors will be better positioned to differentiate their practices through a personalized, goals-driven wealth management approach that works to build brave futures for the individuals and families they serve."

*ETFs and SMAs offered through SEI Managed Account Solutions

About SEI®

SEI (NASDAQ:SEIC) delivers technology and investment solutions that connect the financial services industry. With capabilities across investment processing, operations, and asset management, SEI works with corporations, financial institutions and professionals, and ultra-high-net-worth families to solve problems, manage change and help protect assets—for growth today and in the future. As of Sept. 30, 2021, SEI manages, advises, or administers approximately $1.3 trillion in assets. For more information, visit seic.com.

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