

May 4, 2022



SEI Adds Suite of Tax-Sensitive Strategies Featuring Capital Group ETFs and American Funds

New Solutions Deliver Enhanced Tax Efficiency and Investment Flexibility

OAKS, Pa., May 4, 2022 /PRNewswire/ -- SEI® (NASDAQ: SEIC) today announced it has expanded its suite of models featuring Capital Group exchange traded funds (ETFs) and American Funds mutual funds to include 12 new tax-sensitive solutions. The new solutions support independent advisors' ability to deliver goals-based, personalized wealth management through the SEI Wealth PlatformSM (SWP).

The SEI Strategies featuring the American Funds [launched in 2020](#) and offer a diversified selection of portfolios allocated [across regions](#), risk tolerances, and investment objectives. SEI's Investment team builds the portfolios by selecting a range of American Funds, accessed through low-cost F-3 shares, to provide scale and efficiency for advisors employing a transparent, goals-based approach for their clients.

The 12 new strategies are hybrid model portfolios that combine Capital Group's active transparent ETFs and American Funds in an effort to maximize tax-efficient equity and tax-advantaged fixed income exposures across a range of diversified strategic asset allocations. With the ability to select global or U.S.-focused portfolios, the new strategies offer advisors additional customization and tax management capabilities within SWP.

J. Womack, Managing Director of Investment Products and Personalization for SEI's advisor business, said:

"As clients continue to demand personalization and transparency in their investment portfolios, it's critical that their advisors have access to a wide range of solutions that support a goals-based wealth management strategy. We are thrilled to further expand our relationship with Capital Group and continue to add to the SEI Strategies featuring Capital Group ETFs and American Funds, which are designed to deliver targeted investment outcomes, tax efficiency, and flexibility across global and U.S.-specific allocations. Our innovative end-to-end advisor technology platform and investment philosophy, paired with Capital Group's investment approach, empowers advisors as they aim to achieve their clients' financial goals and build brave futuresSM."

Holly Framsted, Head of ETFs at Capital Group, said:

"This is the first time our recently-launched ETFs will be available in a model wrapper alongside our American Funds. We are pleased to deepen our relationship with SEI as they launch these latest tax-aware strategies for advisors and their clients. The suite of 12 new strategies provides investors with meaningful tax advantages and flexibility, offering advisors another valuable set of tools to support their clients' goals-based strategies, demonstrating the shared commitment by SEI and Capital Group to deliver superior long-term investment solutions to investors."

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 March 31, 2022, SEI manages, advises, or administers approximately \$1.3 trillion in assets. For more information, visit seic.com.

About Capital Group

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, 2021, Capital Group manages more than \$2.7 trillion in equity and fixed income assets for millions of individual and institutional investors around the world. Capital Group manages 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.

For more information, visit capitalgroup.com

Neither SEI nor its subsidiaries provide tax advice. Please note that (i) any discussion of U.S. tax matters contained in this communication cannot be used by you for the purpose of avoiding tax penalties; (ii) this communication was written to support the promotion or marketing of the matters addressed herein; and (iii) you should seek advice based on your particular circumstances from an independent tax advisor.

Company Contact:

Netanel Spero
SEI
+1 610-676-4556
nspero@seic.com

Media Contact:

Kerry Mullen
Vested
+1 201-674-4185
kerry@fullyvested.com

View original content: <https://www.prnewswire.com/news-releases/sei-adds-suite-of-tax-sensitive-strategies-featuring-capital-group-etfs-and-american-funds-301539569.html>

SOURCE SEI Investments Company