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# SEI Enhances Suite of Strategies Featuring Dimensional with U.S. Focused and Tax-Managed Offerings

*Three New Sets of Strategies Further Enhance Flexibility for Advisors*

OAKS, Pa., June 29, 2023 /PRNewswire/ -- SEI® (NASDAQ: SEIC) today announced the addition of three sets of strategies to its suite of model portfolios using ETFs managed by Dimensional Fund Advisors (Dimensional). Building upon the existing set of models, SEI Strategies featuring Dimensional, the full set of strategies now consists of 24 models, comprised of four sets of six model portfolios across a broad range of investment objectives and risk profiles. The new strategy sets include:

- SEI Tax-Managed Strategies featuring Dimensional
- SEI U.S. Focused Strategies featuring Dimensional
- SEI U.S. Focused Tax-Managed Strategies featuring Dimensional

Launched in 2022, the SEI Strategies featuring Dimensional seamlessly blend SEI's disciplined investment approach and connective technology with Dimensional's ETFs to create strategies that are grounded in an investor's goals and decades of economic theory. Dimensional's ETFs are built on 40 years of experience using financial science to pursue higher expected returns for investors. Together with SEI, the models provide advisors with the ability to offer clients greater investment flexibility and factor-based investment capabilities through the SEI Wealth Platform℠.

**J. Womack, Global Head of Investment Solutions at SEI, said:**

"We're unwavering when it comes to delivering flexible investment solutions that can help investors meet their financial objectives. By supporting the entirety of our clients' investable assets, both taxable and non-taxable, we can fully power a goals-based wealth management approach. This is the strongest way to help an investor. As client demand for flexibility grows, we've expanded our suite of strategies to meet these needs.

"Our collaboration with Dimensional connects SEI's legacy in asset allocation and partnering with independent advisors with Dimensional's legacy in investment science. We're thrilled to expand our work with them to offer advisors more flexibility to choose investments that align with clients' goals, and to introduce a series of tax-managed strategies designed to help investors keep more of what they earn in an effort to secure a stable financial future."

**Bryce Skaff, Co-Head of Global Client Group at Dimensional, said:**

"We believe in the value of financial advice as an integral tool in helping individual investors achieve their long-term financial goals. SEI constructing these models with Dimensional ETFs highlights our shared goal to deliver a better wealth management experience through efficient, well-diversified, and systematic portfolios for their clients."

**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 help drive growth, make confident decisions, and protect futures. As of March 31, 2023, SEI manages, advises, or administers approximately $1.3 trillion in assets. For more information, visit seic.com.

**About Dimensional Fund Advisors**

Dimensional is a leading global investment firm that has been translating academic research into practical investment solutions since 1981. Guided by a strong belief in markets, we help investors pursue higher expected returns through a systematic investment process that integrates research insights with advanced portfolio design, management, and trading while balancing tradeoffs that can impact returns. Dimensional is headquartered in Austin, Texas, and has 14 global offices across North America, Europe, and Asia. As of March 31, 2023, Dimensional manages $614 billion for investors worldwide. For more information, please visit dimensional.com.

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