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SEI Grows Institutional Outsourcing Business by \$24 Billion in Three Years

Company Adds \$7.9 Billion in New OCIO Assets in 2014

OAKS, PA -- (Marketwired) -- 01/29/15 -- [SEI](#) (NASDAQ: SEIC) reported continued growth in its institutional outsourcing business with the addition of \$7.9 billion in new global institutional assets in 2014, contributing to a \$24 billion high over the past three years. A sampling of SEI's recently added U.S. institutional clients include Major League Baseball, Media General, Northern California Plasterers Industry Trust Funds, the City of Oak Park (MI) Employees' Retirement System, the City of St. Joseph (MI) Employees' Retirement System, the City of Royal Oak (MI) Employees' Retirement System, West Chester University Foundation, and the previously announced [Edward-Elmhurst Healthcare System](#).

SEI's open architecture outsourced chief investment officer (OCIO) model continues to appeal to larger institutional investors looking for a flexible solution to build custom strategies. New clients also value SEI's investment expertise and teams of resources dedicated to serving each market. Corporate pension plans, for example, receive advice on the best funding and de-risking strategies by a team of in-house actuaries, corporate finance, and pension investment experts.

"In a time of complex markets and limited resources, many institutional investors are partnering with an OCIO for trusted investment advice and delegation of tactical and strategic investment processes," said [Edward Loughlin](#), Executive Vice President, SEI and head of SEI's [Institutional Group](#). "For the past 25 years, SEI has been working with institutional investors to build custom, sophisticated portfolios and implement results-driven investment strategies to meet their goals."

In addition to the continued demand for OCIO services by retirement plans, SEI has seen a 28 percent increase in assets from foundations, endowments, and healthcare organizations over the past two years. Nonprofit and healthcare organizations now represent 39 percent of SEI's U.S. OCIO clients. Some of the new assets come from existing clients like Wright State University (WSU), which expanded its OCIO partnership with SEI in 2014 by delegating management of its operating pool, in addition to the WSU Foundation fund. Working with SEI, WSU is able to create a holistic investment strategy integrating multiple asset pools and the impact on foundation and institutional finances.

"Outsourcing continues to gain momentum among all types of institutional investors not only as a means to enhance their investment programs, but as a way to focus time, effort, and resources on strategic decisions like asset allocation, risk management, spending needs, and corporate finance," said [Paul Klauder](#), Vice President and Managing Director, SEI's [Institutional Group](#). "SEI's continued success in the OCIO market is a testament to our track record and status as a trusted, global leader."

About SEI's Institutional Group

SEI's Institutional Group is one of the first and largest global providers of outsourced investment management services. The company delivers integrated retirement, healthcare and nonprofit solutions to more than 475 clients in eight countries. Our solutions are designed to help clients meet financial objectives, reduce business risk and fulfill their due diligence requirements through implemented strategies for the management of defined benefit plans, defined contribution plans, endowments, foundations, and board designated funds. For more information visit: seic.com/institutions.

About SEI

SEI (NASDAQ: SEIC) is a leading global provider of investment processing, investment management, and investment operations solutions that help corporations, financial institutions, financial advisors, and ultra-high-net-worth families create and manage wealth. As of December 31, 2014, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages or administers \$625 billion in mutual fund and pooled or separately managed assets, including \$253 billion in assets under management and \$372 billion in client assets under administration. For more information, visit seic.com.

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