

April 8, 2014



## **SEI Launches Innovative New Website for Private Wealth Management Clients**

### **Website Helps Clients Track All Assets and Measure Progress Against Established Goals**

OAKS, PA -- (Marketwired) -- 04/08/14 -- [SEI](#) (NASDAQ: SEIC) today announced the launch of its new Private Wealth Management client website. This innovative online resource provides individual and family clients an overview of all their assets in relation to their established goals, which can be organized by self, family, and community, in one, centralized place. The enhanced website gives clients the reporting flexibility and full transparency to customize views of their data and drill down to track how each goals-based portfolio is doing in achieving its objective. It provides clients with a more holistic picture of their current assets as well as the wealth they want to pass on to future generations. The new offering is the latest goals-based offering from [SEI Private Wealth Management](#).

"SEI has been on the cutting edge of goals-based investing for more than a decade and we are committed to offering technology solutions that help high-net-worth investors achieve their goals," said [Michael Farrell](#), Managing Director for [SEI Private Wealth Management](#). "We believe the most relevant metric of success is progress towards the goals you set for yourself, your family, and your community. Our new client website is designed to give investors a big-picture view of their wealth to assist them in making the best financial decisions to meet their needs today and in the future."

In addition to providing a comprehensive overview of all client assets, including third-party assets, the Private Wealth Management client website presents scorecards that let clients quickly track their progress towards achieving specific goals. Using a variety of success metrics, clients are given feedback on whether they are on track to meet target objectives. Furthermore, clients can also view the asset allocations for each investment account, as well as holdings and transactions by account, and compare each against established objectives.

The enhanced website also offers clients access to in-depth data surrounding all of their financial resources. There is a section that provides a cash-flow summary, including deposits, withdrawals, and overall projections, and charts progress towards set targets. Clients using the site will have access to a secure document library for important personal documents, as well as an area to organize, view, and pay various personal and family bills.

Clients will receive custom commentary from their SEI relationship manager on transactions and spending trends, and will have the ability to speak with a variety of financial experts.

"Many investors are goal-oriented and believe they have financial plans that accurately reflect their specific goals," said [Jeff Ladouceur](#), Director for [SEI Private Wealth Management](#). "However, most are not able to see all their assets in relation to their goals and measure against them. We work with our clients to create investment portfolios that align with their personal objectives, as well as goals for their families and communities. With the new client website, they have a comprehensive view of their financial data and can track everything against their goals -- all in one, convenient place."

For a tour of the SEI Private Wealth Management client website, please visit:  
[www.seic.com/pwmsite](http://www.seic.com/pwmsite).

### ***About SEI Private Wealth Management***

SEI Private Wealth Management provides clarity into the complex issues faced by wealthy individuals and families so they can make better decisions for themselves, their families, and their communities. In September 2011, SEI Private Wealth Management, formerly the SEI Wealth Network, was named to the National Association of Board Certified Advisory Practices' (NABCAP) Premier Advisor list, published by the *Philadelphia Business Journal*. SEI Private Wealth Management is an umbrella name for various life and wealth advisory services provided by SEI Investments Management Corporation (SIMC). SIMC is a subsidiary of SEI. For more information about SEI Private Wealth Management, visit [www.seic.com/privatewealth](http://www.seic.com/privatewealth).

### ***About SEI***

SEI (NASDAQ: SEIC) is a leading global provider of investment processing, fund processing, and investment management business outsourcing solutions that help corporations, financial institutions, financial advisors, and ultra-high-net-worth families create and manage wealth. As of December 31, 2013, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages or administers \$559 billion in mutual fund and pooled or separately managed assets, including \$232 billion in assets under management and \$327 billion in client assets under administration. For more information, visit [www.seic.com](http://www.seic.com).

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Source: SEI