

February 21, 2013



SEI Quick Poll: Nonprofits Place Greater Emphasis on Timely Implementation of Investment Strategies in 2013

Survey Reveals the Top 10 Investment Priorities for Nonprofits This Year

OAKS, PA -- (Marketwire) -- 02/21/13 -- According to an annual [SEI](#) (NASDAQ: SEIC) Quick Poll, 2013 sees nonprofit executives placing greater emphasis on implementing investment strategies that take advantage of market inefficiencies to add return and/or mitigate risk, moving this priority up to third from sixth last year. The top two investment priorities for nonprofits remained the same as 2012: poll participants ranked aligning asset allocation decisions with organizational finance decisions first, followed by making portfolio changes focused on downside risk protection.

Conducted by SEI's Nonprofit Management Research Panel in January 2013, the poll surveyed more than 130 executives and committee members overseeing U.S. nonprofit endowments to identify their challenges and top 10 investment priorities for the upcoming year. Additionally, almost two-thirds (65 percent) of participating nonprofits said they currently use or are considering using an [outsourced chief investment officer \(OCIO\)](#), a 22-percent increase from last year's annual outlook poll.

"Having experienced the volatility of the past few years, nonprofit executives are focusing on protecting the financial well-being of their portfolios in order to support their core missions and the increasingly important role that endowments play in the overall financial health of organizations," said [Mary Jane Bobyock](#), Director of [Nonprofit Advice](#), SEI's [Institutional Group](#). "A complex market, coupled with increased fiduciary awareness and limited resources, have prompted nonprofit leadership and investment committees to show increased interest in partnering with an OCIO."

Poll participants were also asked a series of questions on their portfolio strategies for the upcoming year. Interest rates have been low for so long that 71 percent of poll participants are not concerned about inflation in 2013. Despite this, 39 percent said they will invest in a variety of inflation-hedging products, with about half (49 percent) investing in private real estate. The majority (85 percent) of those surveyed said they will invest in alternative strategies this year, with a fund of funds model being the most popular option for implementation. Community foundations are the most likely to invest in alternatives, followed closely by colleges and universities.

None of the participating nonprofit organizations are Institutional clients of SEI. Both a general nonprofit poll summary and a college- and university-specific poll summary are available by visiting: www.seic.com/2013nonprofitOutlook.

About SEI's Institutional Group

SEI's Institutional Group is one of the first and largest global providers of outsourced fiduciary management investment services. The company began offering these services in 1992 and today acts as a fiduciary manager to more than 450 retirement, nonprofit and healthcare clients in seven different countries. Through a flexible model designed to help our clients achieve financial goals, we provide asset allocation advice and modeling, investment management, risk monitoring and stress testing, active liability-focused investing and integrated goals-based reporting. For more information, visit <http://www.seic.com/institutions/>.

About SEI

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Source: SEI