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SEI's ProcessWise Program Introduces New Workflows Designed to Maximize Advisor Efficiency and Productivity

48 Workflows Crafted for Sales, Client Service, Marketing, and Practice Management

OAKS, PA -- (Marketwired) -- 05/20/15 -- As financial advisors look for new sources of productivity and efficiency, [SEI](#) (NASDAQ: SEIC) announced today the launch of SEI ProcessWise, a comprehensive workflow program which streamlines client interactions, sales, marketing, and practice management tasks. With 48 step-by-step workflow processes across multiple business functions, SEI ProcessWise can be integrated with a firm's CRM system providing staff members with automatic notifications to complete their assigned tasks. Through a partnership with Redtail Technology, SEI has preconfigured all of the workflows within the Redtail CRM platform to enable this integration for advisors using that CRM.

The program is being launched as advisors face increasingly complex client relationships and ongoing industry consolidation making it more important for firms to create standardized processes in order to drive value. With a wide assortment of workflows and the added power of integration and automation, SEI ProcessWise provides the benefits of a highly-customized solution at a significantly lower cost. While the workflow processes and the integration are complimentary, the program also includes three months of training designed to ensure that advisors adopt the automated workflows into their daily routines at a nominal cost.

"Despite the fact that they know they need to have workflows and systemized processes, most advisors simply don't have the time it takes to develop their own or the resources to have someone else come up with a custom solution," said [Raef Lee](#), Managing Director of the [SEI Advisor Network](#). "We believe we've come up with a solution that can be used across most aspects of an advisor's business. By utilizing these workflows, advisors will ultimately deliver more value to the client experience and increase their firm's value at the same time."

"The collaboration between Redtail and SEI creates one of the deepest levels of workflow integration in the industry," said Redtail CEO Brian McLaughlin. "With these preconfigured processes, advisors can be confident that they will stay on top of important tasks thereby

providing an enhanced and consistent experience to their clients. That's really key to maintaining and building positive client relationships."

A SEI survey¹ found that more than half (54 percent) of advisors have yet to adopt workflow processes. Meanwhile, more than half of advisors who claim to have workflows in place actually rely on memory, post-it notes, to-do lists, or travelling checklists to implement tasks.

To learn more about the SEI Advisor Network, please visit seic.com/advisors.

About The SEI Advisor Network

The SEI Advisor Network provides financial advisors with turnkey wealth management services through outsourced investment strategies, administration and technology platforms, and practice management programs. It is through these services that SEI helps advisors save time, grow revenues, and differentiate themselves in the market. With a history of financial strength, stability, and transparency, the SEI Advisor Network has been serving the independent financial advisor market for more than 20 years, with over 6,100 advisors working with SEI, and \$48.9 billion in advisors' assets under management (as of March 31, 2015). The SEI Advisor Network is a strategic business unit of SEI. For more information, visit seic.com/advisors.

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 March 31, 2015, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages or administers \$648 billion in mutual fund and pooled or separately managed assets, including \$258 billion in assets under management and \$390 billion in client assets under administration. For more information, visit seic.com.

¹ Source: SEI Survey, November 2013, N = 512

SEI and RedTail Technology are not affiliated.

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