

August 7, 2023



SEI Enhances Personalized Investor Experience with Values Questionnaire and Reporting Solution

New Applications Help Advisors Connect Investors to What Matters Most

OAKS, Pa., Aug. 7, 2023 /PRNewswire/ -- [SEI](#)® (NASDAQ:SEIC) today announced the launch of the Values Questionnaire (VQ) and Impact Report through a strategic partnership with YourStake, a top-rated¹ financial advisor solution for environmental, social, and governance, faith-based, and values-based investing. The VQ empowers financial advisors utilizing the SEI Wealth PlatformSM to understand a client's top values in order to facilitate personalized portfolio research.

The VQ creates a Values Persona for an individual investor by identifying personality categories based on actions an individual considers in their daily life. The Values Persona helps advisors customize investment portfolios according to their client's personal values. The impact report enables an advisor to differentiate their practice by utilizing transparent data and simple metrics to demonstrate how these custom portfolios align with a client's or prospective client's specific values.

J. Womack, Global Head of Investment Solutions for SEI's Asset Management business, said:

"Increasingly, clients seek deeper alignment between their portfolios and personal values. Yet, accurately communicating these values can often pose a challenge for clients, and advisors may struggle to uncover them. Our strategic partnership with YourStake provides financial advisors with an opportunity to understand their clients beyond just their investment needs—related to their family, aspirations, and preferences—helping them create an experience and personalized portfolio that clients feel much more connected to."

Gabe Rissman, President and Co-Founder at YourStake, said:

"At YourStake, we're on a mission to make values-based investing personalized, explainable, and transparent. Our strategic partnership with SEI highlights both companies' goal to listen to advisors and provide them with tools to foster growth and meaningful relationships with clients. We're thrilled to match our application with SEI's connected wealth experience as we work together to build a financial future that is sustainable."

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 June 30, 2023, SEI manages, advises, or administers approximately \$1.3 trillion in assets. For more information, visit seic.com.

About YourStake.org

YourStake helps Financial Advisors understand their client/prospect values by utilizing a Behavioral Values Questionnaire to better understand the most important beliefs their clients have. This questionnaire paired with tangible, personalized, impact reporting helps clients invest in portfolios that better align with their values, and helps advisors demonstrate the tangible impact of values-aligned investing. Portfolio Managers benefit from YourStake's platform which provides transparent and objective raw data from over 200 sources. Wealth managers and financial advisors use YourStake's tools to discover and engage on client values across the sustainable investment journey, from prospecting to investing, to reporting, and to explain impact reports that highlight the outcomes achieved by investments. Solutions are available for individual RIAs and for enterprises.

¹Number 1 rated analysis tool from the T3/Inside Information 2023 Survey for ESG/SRI analysis tools.

Environmental, social and governance (ESG) guidelines may cause a manager to make or avoid certain investment decisions when it may be disadvantageous to do so. This means that these investments may underperform other similar investments that do not consider ESG guidelines when making investment decisions. ESG and Sustainability are not uniformly defined across the industry.

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