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SEI, Redtail Technology, ActiFi, and MoneyGuidePro Announce Innovative Advisor Workflow Partnership

Collaboration Marks the First Time Workflows From a CRM System Are Fully Integrated With a Financial Planning Tool and a Custodial Platform

OAKS, PA -- (Marketwired) -- 02/10/14 -- Four of the financial advisor industry's leading technology and service providers today announced that they have entered into a strategic partnership to make automated workflows broadly accessible to financial advisor firms for the first time. Unlike previously available integration offerings, the strategic partnership between SEI (NASDAQ: SEIC), Redtail Technology, MoneyGuidePro, and ActiFi marks the first time that workflows from a CRM system, a financial planning tool, and a custodial platform have been fully integrated with one another. The result is a packaged workflow solution designed to increase productivity and efficiency, enhance the client experience, and ultimately increase value for advisor firms. The companies will demonstrate the capabilities the partnership provides at the industry's 9th annual "T3" Technology Tools for Today™ Conference this week with a broader rollout slated for later this year.

The collaboration comes at a time when increasingly complex client relationships and on-going industry consolidation have made it more important for advisor firms to create standardized processes in order to drive firm value. The workflow partnership is designed to deliver levels of automation previously unavailable at a significantly lower cost of existing custom integration models, while significantly reducing implementation time.

"This strategic partnership is a game-changer for financial advisors. Historically they had to adapt their businesses to fit in with technology but now it's the advisors' daily activities that are driving the technologies," said Kevin Crowe, Head of Product Development for the SEI Advisor Network. "Each of the partners brings deep expertise and insight to a key area of an advisor's business and the value of what we are offering is truly unprecedented in the industry. We have created a level of integration and automation that was never before available and made it broadly accessible to all advisors free of charge. This levels the playing field and allows advisors to create firm value at a time when they need it most."

Through this partnership, the SEI Wealth Platform(SM) provides the custodial, investment management, and practice management capabilities as well as a front-office suite of

services in a tightly integrated workflow. These services will be combined with the CRM system and financial planning engine of Redtail and MoneyGuidePro respectively. Redtail provides an automated workflow hub with a sophisticated workflow engine that ties all the components together. MoneyGuidePro integrates seamlessly with the other components and passes goals-based financial planning information directly into SEI's new proposal system. Practice management experts ActiFi designed the workflows based on the best practices derived from millions of real world advisor business activities.

"This is the first time that Redtail's new automated workflow CRM engine has been used with other applications," according to Brian McLaughlin, CEO of Redtail. "It allows Redtail to be the hub, guiding activities to the right people in an advisor's organization as well as through the financial planning software and advisor custodial platform."

"It is also the first time that an advisor is able to create a goals-based financial plan, passing the data directly into an advisor's proposal system, seeing it flow into their platform all the way through custody. In this seamless integration, the same goals are shown on statements and progress is reported against the original goals throughout the client relationship," commented Tony Leal, CTO of MoneyGuidePro.

"It's been exciting to have this level of tight integration in the key advisor applications. This offering is a true benefit to the advisor," said Spenser Segal, CEO, ActiFi.

The workflows will be available to advisors as part of the SEI Wealth Platform(SM). Beta testing with a select group of advisors is set to begin, while the workflows will be widely available later this year.

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, has over 5,700 advisors who work with SEI, and $41 billion in advisors' assets under management (as of December 31, 2013). The SEI Advisor Network is a strategic business unit of SEI. For more information, visit www.seic.com/advisors.

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.

About Redtail Technology
Redtail Technology is a leading provider of web-based Client Relationship Management (CRM), paperless office and email archiving solutions in the financial services industry. Easily affordable, easy to implement and offering integration with many of the industry's most widely-used applications, Redtail is committed to providing financial advisors with the

core technologies that drive their day-to-day operations. CRM is ultimately about not only acquiring and managing your clients and prospects -- it's also about servicing them and, in turn, extracting value from the relationships. At the same time, it's about doing all of these things while simultaneously improving operational efficiency. Visit www.redtailtechnology.com for more information.

About MoneyGuidePro
MoneyGuidePro, the flagship product of PIEtech, Inc., is web-based financial planning software program that helps advisors create, implement and maintain investment strategies that will best meet the lifetime financial goals of their clients. MoneyGuidePro provides retirement and college planning, asset allocation, insurance needs analysis and estate planning. For more information on MoneyGuidePro, visit www.moneyguidepro.com.

About ActiFi
ActiFi™ is a coaching, software, and consulting company that creates scalable business execution programs for the financial services industry. By implementing its proven people, process, and technology solutions based on research, best-practices, and industry benchmarks, ActiFi clients run more effective and profitable businesses. Learn more at http://www.actifi.com.

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