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SEI Adds Tax-Managed Strategies to Suite of Models Featuring Capital Group

New Solutions to Help Maximize Tax-Efficiency and Drive Investment Flexibility

OAKS, Pa., May 16, 2023 /PRNewswire/ -- [SEI](#)® (NASDAQ:SEIC) today announced the addition of two tax-managed strategies to its suite of models featuring Capital Group®. The SEI Tax-Managed Strategies and SEI U.S. Focused Tax-Managed Strategies—both with the American Funds®—deliver the ability to actively tax-loss harvest and offer flexible investment solutions across a range of asset allocations. These strategies replace previous tax-sensitive versions and will be part of hybrid models that combine Capital Group exchange traded funds and American Funds mutual funds designed to maximize tax-efficient equity exposure and tax-advantaged income.

Launched in 2020, the SEI Strategies featuring the American Funds offer a diversified selection of portfolios allocated across regions, risk tolerances, and investment objectives to help advisors meet clients' long-term goals through a transparent, cost-effective goals-based wealth management approach. SEI's investment team builds the portfolios using a core selection of American Funds accessed through low-cost F-3 shares to provide scale and efficiency for advisors based upon the company's asset allocation philosophy.

J. Womack, Global Head of Investment Solutions at SEI, said:

"For nearly three decades, SEI has been dedicated to understanding and addressing the unique needs of individual investors across taxable and tax-deferred accounts. As the demand for investment flexibility grows, so does the importance of delivering tax-efficient solutions.

"Our collaboration with Capital Group enables us to offer SEI Strategies featuring American Funds and their ETFs, which combines SEI's deep expertise in asset allocation and tax management with the trusted and iconic brand of the American Funds. By utilizing strategies tailored to minimize tax liabilities from capital gains and investment income, we strive to empower investors to keep more of what they've earned, ultimately supporting them in achieving their financial goals and securing a stable financial future."

Pete Thatch, Senior Vice President, Director of National Accounts at Capital Group, said:

"Advisors are increasingly turning to model portfolios to outsource the investment management side of their practice to fund managers committed to producing superior long-term results. In this way, our actively-managed investment strategies—including our American Funds mutual funds and transparent exchange traded funds—combined with SEI's tax overlay and investment flexibility, can help advisors serve their clients and focus on understanding, planning for, and achieving their financial goals."

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 solve problems, manage change and help protect assets—for growth today and in the future. As of March 31, 2023, SEI manages, advises, or administers approximately \$1.3 trillion in assets. For more information, visit seic.com.

Investment services provided by SEI Investments Management Corporation, a wholly owned subsidiary of SEI Investments Company (SEI).

Neither SEI nor its subsidiaries provide tax advice. Please note that (i) any discussion of U.S. tax matters contained in this communication cannot be used by you for the purpose of avoiding tax penalties; (ii) this communication was written to support the promotion or marketing of the matters addressed herein; and (iii) you should seek advice based on your particular circumstances from an independent tax advisor.

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