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SEI Expands ETF Strategy Line-up with New Domestic Offerings

Strategies Support Goals-Based Approach with Greater Investment Flexibility

OAKS, Pa., Aug. 24, 2021 /PRNewswire/ -- SEI (NASDAQ: SEIC) today announced the launch of the SEI Domestic ETF Strategies, adding five new asset allocation-based models to the SEI ETF Strategy family. The Strategies offer independent advisors enhanced investment flexibility through the SEI Wealth PlatformSM.

"Investors are increasingly looking to their advisors for lower-cost, tax-efficient and transparent investment solutions that can help them to achieve their financial goals," said J. Womack, Managing Director of Investment Products and Services for Independent Advisor Solutions by SEI. "We're excited to expand our ETF solutions and provide advisors the added flexibility to offer their clients a range of thoughtfully constructed and well-diversified model portfolios that emphasize domestic equity and fixed income exposures."

The new Strategies leverage SEI's investment philosophy and oversight, as well as its long-standing expertise in asset allocation, to develop diversified portfolios comprised of ETFs from a wide range of leading investment managers. The underlying asset allocation models are designed to maximize risk-adjusted returns with options across a broad risk-return spectrum—all of which exclusively allocate to equity and fixed income securities issued by U.S. companies.

"Personalized investment solutions are the heartbeat of an advisor's ability to support their clients through effective goals-based wealth management," said Erich Holland, Head of Distribution and Engagement for Independent Advisor Solutions by SEI. "We're thrilled to further expand our ever-growing suite of solutions, especially our existing Strategic ETF, Tactical ETF and Tax-Managed ETF Strategies family, with options that offer advisors both the choice and support their clients deserve."

About Independent Advisor Solutions by SEI

Independent Advisor Solutions by SEI delivers technology and investment solutions that provide a unified, digital wealth management experience for independent financial advisors and their clients. The integration of technology, investment flexibility, custody services and practice management tools connects advisors to their clients and empowers confident

decision-making for their financial futures. A strategic business unit of SEI and serving the independent financial advisor market for nearly 30 years, Independent Advisor Solutions works with over 7,500 advisors and supports approximately \$95.2 billion in advisors' total platform assets¹, which includes \$81.6 billion in assets under management (as of June 30, 2021). For more information, visit seic.com/advisors.

¹\$13.6 billion in platform assets represents third-party assets held in custody accounts at SEI Private Trust Company.

About SEI

After 50 years in business, SEI (NASDAQ:SEIC) remains a leading global provider of investment processing, investment management, and investment operations solutions designed to help corporations, financial institutions, financial advisors, and ultra-high-net-worth families create and manage wealth. As of June 30, 2021, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages, advises or administers approximately \$1.3 trillion in hedge, private equity, mutual fund and pooled or separately managed assets, including approximately \$399 billion in assets under management and \$880 billion in client assets under administration. For more information, visit seic.com.

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