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SEI Quick Poll: 80 Percent of Wealth Management Organizations Plan to Invest in Operational Infrastructure in Next Year

Wealth Managers View Creating Efficiencies a Vital Part of Operational Philosophy

OAKS, PA -- (Marketwire) -- 04/16/12 -- According to an SEI (NASDAQ: SEIC) Quick Poll released today, in an era where wealth management organizations face increased pressure to grow revenue and create a differentiated client experience, 80 percent of those polled at the ABA Wealth Management and Trust Conference plan to invest in operational infrastructure in the next 12 months in order to help meet their goals. Much of the investments will focus on shifting toward using one operating platform, as more than one-third (42 percent) of those polled plan to move to a single operating infrastructure environment within the next 24-36 months.

Nearly half (48 percent) of the wealth management organizations polled view "creating efficiencies" as the phrase that best describes their organization's operational philosophy, a goal that can be met, in part, by moving to a single operating infrastructure environment. Moving operations to one centralized infrastructure enables wealth management organizations to increase the amount of time they spend on revenue-enhancing activities, including client service and business development.

"Over the past few years, as end investors have called for more personalized relationships with their financial advisors, we've observed a fundamental shift in the way the wealth management industry is approaching growth and the client experience," said Dave Schug, Managing Director of SEI's [Global Wealth Services](#). "Now, more than ever, wealth management organizations need a solution that significantly reduces risk, inefficiencies, and administrative overhead. Ultimately, they need a solution that gives their wealth managers the time to do what they do best -- build their clients' wealth and increase the depth of their client relationships -- and we're pleased to provide them with the technology and operations to do just that."

The poll also revealed that while no respondents report a "scared" 2012 economic outlook, nearly two-thirds (60 percent) are "cautious." In addition to focusing on "growing revenue"

(48 percent), wealth management firms are also committed to "creating a differentiated experience for clients" (28 percent).

The poll was completed by 25 wealth management executives, compliance officers, and administration professionals from a mix of national and global, regional, community, and family-office wealth management organizations. SEI conducted the poll at the ABA Wealth Management and Trust Conference held March 14 - 16 in Scottsdale, AZ. To learn more about SEI's Global Wealth Services, please visit <http://www.seic.com/enUS/private-banks.htm>.

About SEI's Global Wealth Services

SEI's Global Wealth Services is an outsourcing solution for wealth managers encompassing wealth processing services and wealth management programs, coupled with business process expertise. The integrated offering aims to provide wealth management organizations the infrastructure, operations and administrative support necessary to capitalize on their strategic objectives in a constantly shifting market. For more information visit: <http://www.seic.com/enUS/private-banks.htm>.

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, 2011, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages or administers \$404 billion in mutual fund and pooled or separately managed assets, including \$172 billion in assets under management and \$232 billion in client assets under administration. For more information, visit www.seic.com.

Source: SEI