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## **SEI Launches New Tax-Managed ETF Strategies to Help Advisors Meet Growing Investor Demand**

### **Provide Cost-Effective Tax Management Solutions Across Risk-Return Spectrum**

OAKS, PA -- (Marketwired) -- 03/31/14 -- In a move designed to help financial advisors meet the growing demand for low-cost, tax-conscious investment strategies, [SEI](#) (NASDAQ: SEIC) today announced that it has launched a set of new tax-managed exchange traded fund (ETF) strategies. The new investment offerings, which include five strategies that span a broad risk-return spectrum, give advisors the flexibility to better manage the impact of taxes while seeking to maintain the expected risk-return characteristics of a client's portfolio.

Developed as a tax-efficient and scalable way to give clients exposure to ETF strategies, SEI's tax-managed ETF offering consists of five distinct strategies: conservative, moderate, market growth, aggressive, and equity. The strategies invest in underlying ETFs, each of which has its own investment goal, that are selected through SEI's research-based approach that seeks to provide high levels of liquidity and diversification across a variety of asset classes. The strategies typically consist of equity and fixed-income ETFs, but may also provide exposure to additional asset classes, such as real estate, commodities, and currencies.

"Clients are demanding more low cost solutions that will not only address their specific investment goals but also help offset the current increase in taxes," said [Kevin Crowe](#), Head of Product Development for the [SEI Advisor Network](#). "We've developed a unique set of strategies that are designed to maintain the characteristics of their individual portfolios while lowering the cost and improving tax efficiency. SEI has long been an innovator in the tax-managed investment space and this new offering complements our existing line of actively tax-managed strategies. At a time when investors are more sensitive to tax implications, these strategies will provide advisors with the flexibility, transparency, and tax advantages that their clients demand."

To manage the impact of taxes, the strategies may use tax-management techniques such as purchasing municipal fixed-income ETFs to seek to create tax-exempt income, controlling portfolio turnover levels, selling securities with the least tax impact, and opportunistically

harvesting losses. SEI will also seek to manage the portfolio in a manner intended to avoid the occurrence of a "wash sale" while maintaining exposure to its desired asset classes. These techniques are what make the new ETF strategies unique.

The tax-managed ETF strategies join SEI's existing tax-managed product line, which includes tax-managed mutual funds and the company's extensive separately managed accounts program. One of the pioneers in offering tax-managed investment solutions, SEI has been offering a range of tax-managed investment strategies since 1998.

*SEI Investments Management Corporation (SIMC) is the adviser to the SEI Tax-Managed ETF Strategies. SIMC is a wholly owned subsidiary of SEI Investments Company (SEI).*

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### **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](http://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](http://www.seic.com).

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