

August 24, 2020



SEI Expands Offering to Large Institutional Investors through Operational and Investment Support Platforms

Enhanced CIO Solution Provides Support to In-house Investment Resources

OAKS, Pa. and LONDON, Aug. 24, 2020 /PRNewswire/ -- SEI (NASDAQ:SEIC) today announced the company is broadening its offering to the institutional investor segment through services that provide custom, time-saving operational and investment management support. SEI's [Enhanced CIO](#) leverages the firm's industry leading capabilities around fund administration, development of investment operating platforms and non-fiduciary investment management services to help enhance institutional asset owners' overall infrastructure.

"On a global basis, SEI's track record and ability to provide this range of services is rare in the industry," said Paul Klauder, Head of SEI's Institutional Group and an Executive Vice President of SEI. "We can provide custom operational and reporting support, while also providing access to risk management tools, asset allocation analysis and manager due diligence reports. This type of comprehensive offering is not common and we believe there is no firm better positioned to offer this range of capabilities to institutional investors."

SEI's Enhanced CIO offering is for institutional investors that have made a strategic decision to insource investment management. Enhanced CIO is a suite of services from which institutional investors can choose resulting in a custom platform that can help improve operational due diligence, integrate reporting, meet regulatory and compliance requirements and solve other specific challenges their investment efforts face. These services can include aggregating and reconciling portfolio data, asset allocation studies, risk management, detailed manager due diligence reports and consolidating performance reporting across all asset classes. SEI's Outsourced CIO (OCIO) offering continues to be recognized as an industry leading solution for those institutions that do not desire to have internal investment resources and infrastructure.

"Institutional investors that have decided to manage investments in-house still face significant operational and oversight challenges which SEI's Enhanced CIO helps address and allows their staff to focus their attention on managing the portfolios," said Kevin Matthews, Vice President, Strategic Growth Initiatives, SEI's Institutional Group. "The end

benefit is that in-house investment resources can leverage an infrastructure that can be more efficient, accurate, cost-effective and transparent."

SEI has long standing track-record of providing these services to a wide-range of clients. The company provides investment management services to more than 470 institutional investors and fund administration and accounting services to more than 550 traditional and alternative asset managers, as well as sovereign wealth managers and family offices, representing over \$30 trillion in assets (as of June 30, 2020).

About SEI's Institutional Group

SEI's Institutional Group provides institutional investors with outsourced investment management services and custom platforms to support insourced investment staffs. SEI is one of the first and largest global providers of outsourced or OCIO investment management services to the institutional marketplace and recently has launched its Enhanced CIO services globally to institutional investors that desire to have internal resources. The company delivers these integrated solutions to more than 470 clients in 12 countries, as of June 30, 2020. Our solutions are designed to help clients meet financial objectives, reduce business risk and fulfill their due diligence requirements through implemented strategies for the management of defined benefit plans, defined contribution plans, endowments, foundations and board-designated funds. For more information visit: seic.com/institutional-investors.

About SEI

After 50 years in business, SEI (NASDAQ:SEIC) remains a leading global provider of investment processing, investment management, and investment operations solutions that help corporations, financial institutions, financial advisors, and ultra-high-net-worth families create and manage wealth. As of June 30, 2020, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages, advises or administers \$1 trillion in hedge, private equity, mutual fund and pooled or separately managed assets, including \$318 billion in assets under management and \$693 billion in client assets under administration. For more information, visit seic.com.

Company Contact:

Leslie Wojcik
SEI
+1 610-676-4191
lwojcik@seic.com

Media Contact:

Jacqueline Gogel
Vested
+1 917-765-8720
jacqueline@fullyvested.com

View original content: <http://www.prnewswire.com/news-releases/sei-expands-offering-to-large-institutional-investors-through-operational-and-investment-support-platforms-301116754.html>

SOURCE SEI Investments Company