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SEI Launches Interactive Proposal System to Make Advisor Business Growth Easier

Technology and Live Case Support Team Gives Advisors Turn-key Ability to Generate Complex Proposals for Clients.

OAKS, Pa., Dec. 5 /PRNewswire-FirstCall/ -- SEI (Nasdaq: SEIC) today announced the launch of its Proposal System, a robust solution that advisors can use to build proposals for prospective clients. The tool enables advisors to choose from proprietary SEI investment models based on the needs of each prospective client. According to the SEI Advisor Network, the unit will conduct a phased rollout of the tool throughout the fall and into 2008.

(Photo: http://www.newscom.com/cgi-bin/prnh/20071205/NEW028)

Approximately 35 advisors participated in a three-month beta test earlier this year. Currently, there are more than 1,000 advisors using the proposal system. Rollout to the more than 6,500 advisors working with SEI will continue through next year.

The Proposal System gives advisors the ability to access all of SEI's investment solutions using a single integrated proposal system. In addition to traditional proposals, the solution allows advisors to create Goals-based proposals, which employ SEI's unique goals-based investment approach and process.

"As client needs get more complex, it's nearly impossible for advisors to spend the time necessary to research and present a proposal that separates them from the crowd," said Stephen Onofrio, Senior Managing Director, SEI Advisor Network. "This is another step in giving advisors some relief to successfully pursue those new clients who require more complicated portfolios."

The interactive proposal system was designed to make advisors' internal processes more efficient, but SEI's new solution also provides unique elements that advisors can use with end-investors. For example, some advisors use SEI's proprietary "goals game board," a hands-on, visual tool that helps uncover investors' true aspirations and risk tolerance during the initial client discovery phase.

With the new proposal tool, advisors can transfer the outcome of the game board to their proposals, visually depicting investment scenarios (see Fig. 1). These scenarios match each goal up with a specific investment strategy based on time, resources, asset pools and risk

tolerance. It also includes a personalized investment policy statement as part of the package.

To expand new business resources even further, SEI also offers a live Case Support Team for advisors, which was launched last year. The staff of twenty experienced financial professionals is available to work with advisors to develop a variety of complex, customized proposals for prospective clients.

"Every advisor works differently, so we wanted to offer options for working with SEI that work for them. Some advisors want us to do it all for them, while others just need that extra edge - in this case, a tool we provide that they can use on their own. That's what the coupling of technology and live help does," said Onofrio.

In addition to robust proposal technology, the SEI proposal team will provide live support to advisors, detailed competitive analysis, coach them through presentations, role-play scenarios, and discuss tax transition strategies for new clients. Since its inception in August 2006, the proposal team has helped advisors pitch and win more than $3 billion in new assets.

About the SEI Advisor Network

SEI Advisor Network provides independent advisors with outsourced wealth management platforms that are designed to meet the demands of a new generation of wealthy clients. In an evolving wealth management industry, the group offers an end-to-end process for successfully transforming their clients' businesses in every critical area, including marketing, practice management, investment strategy and client relationship platforms. The SEI Advisor Network is a strategic business unit of SEI. For more information, visit www.seic.com/advisors.

About SEI

SEI (Nasdaq: SEIC) is a leading global provider of outsourced asset management, investment processing and investment operations solutions. The company's innovative solutions help corporations, financial institutions, financial advisors, and affluent families create and manage wealth. As of September 30, 2007, through its subsidiaries and partnerships in which the company has a significant interest, SEI administers $423 billion in mutual fund and pooled assets and manages $202 billion in assets. SEI serves clients, conducts or is registered to conduct business and/or operations from more than 20 offices in over a dozen countries. For more information, visit www.seic.com.

Company Contact:
Dana Grosser
SEI
610-676-2459
dgrosser@seic.com

Media Contact:
Caralyn Gilotti
Braithwaite Communications
215-564-3200 x112
cgilotti@braithwaitepr.com

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