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Attivo Investments Adopts SEI's Co-CIO Solution

SEI's Co-CIO Solution Supports Client-Centric Operating Structure, Provides Personalized Investment Experience and Enhances Efficiency

LONDON, Jan. 8, 2025 /PRNewswire/ -- [SEI](#)® (NASDAQ: SEIC) and Attivo Investments today announced a strategic partnership, leveraging SEI's Co-CIO solution to deliver cutting-edge, scalable, and efficient investment services tailored to advisers and their clients. SEI will support Attivo Investments' in-house team in developing a sophisticated investment approach for advisers to help investors meet their financial goals, as well as providing business support to help power Attivo Investments' growth.



Assets in discretionary managed portfolio services (MPS) in the U.K. have grown 36% in the 12 months prior to September 2024.¹ A Co-CIO structure supports an MPS proposition by

helping ensure an investor's priorities drive every decision by blending strategic vision with operational execution—powered by technology and aligned with evolving regulations.

Portfolio models available for Attivo's clients include:

- **Low Cost:** Six strategies designed with a light goals-based framework focused on preservation and accumulation. These portfolios leverage passive investment building blocks to replicate market performance as it rises and falls. Constructed within a fund-of-funds structure, they provide a simple, transparent, and cost-effective solution for achieving long-term investment objectives.
- **Core:** Seven strategies designed with a heavily goals-based framework focused on preservation, accumulation, and withdrawal. Utilizing a manager-of-managers approach, these portfolios focus on reducing trade frequency and capital gains tax realization, enabling greater efficiency. This strategy blends cost efficiency with access to elite investment expertise.
- **APEX:** Six unconstrained strategies designed for high-net-worth and experienced investors and focused on preservation and accumulation. This strategy includes additional asset classes, such as private equity or hedge funds, providing more flexibility and higher potential returns.

Commenting on the strategic partnership, Charlotte Watson, Chief Investment Officer at Attivo Investments, said:

"Our collaboration with SEI—a backbone of the global financial services industry—is a testament to our commitment to delivering exceptional value to financial planners and their clients. In addition to their asset management capabilities, SEI's proposition leverages their expertise to help drive our growth.

"SEI's investment philosophy and operational framework aligns seamlessly with our culture of innovation and focus on client outcomes, ensuring that we are delivering impactful solutions from day one. We strongly believe this strategic partnership will enable Attivo to rapidly launch and scale an institutional-quality investment management business focused on what matters most to our clients."

Ian Love, Head of Asset Management for EMEA at SEI, added:

"In today's economic environment, personalization and access are no longer the exception to meeting investors' financial goals—they're requirements. Our strategic partnership with Attivo Investments is rooted in a vision of innovation, investment excellence, and a focus on client centricity.

"Our Co-CIO approach empowers Attivo Investments to deliver personalized portfolios at scale, meeting the diverse needs of their financial planners' clients. We're thrilled to help drive positive client outcomes, support Attivo's mission and power their growth."

¹ NextWealth, MPS Proposition Comparison Report, Issue 9, December 2024.

About SEI®

SEI (NASDAQ:SEIC) delivers technology and investment solutions that connect the financial services industry. With capabilities across investment processing, operations, and asset

management, SEI works with corporations, financial institutions and professionals, and ultra-high-net-worth families to help drive growth, make confident decisions, and protect futures. As of Sept. 30, 2024, SEI manages, advises, or administers approximately \$1.6 trillion in assets. For more information, visit seic.com.

About Attivo Investments

Attivo Investments is a modern investment firm focused on goal-based investing, designed exclusively to support financial planners and their clients. Our portfolios align with financial planning goals such as preservation, accumulation, and withdrawal, ensuring investments address real-life objectives rather than theoretical models.

Through a strategic partnership with a global investment brand, we deliver institutional-grade expertise and access to world-class investment strategies. This partnership ensures our portfolios combine active management with affordability, offering exceptional value to financial planners and their clients.

Built with direct input from financial planners, our solutions are tailored to meet the needs of today's clients. Using a scalable and efficient operating model, we provide competitive, outcome-focused model portfolios that are simple, flexible, and aligned with Consumer Duty principles.

At Attivo, we are dedicated to empowering financial planners and helping their clients achieve their financial goals through smarter, more accessible and relatable investment solutions backed by global expertise.

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