

Redefining the Client Experience



IT'S ALL ABOUT THE CLIENT.

That may sound obvious, but it's a mantra that has served us well for more than 30 years. Sure, we pride ourselves on our innovative solutions and industry expertise, but we know that without world-class client service, the rest doesn't matter.

So we're constantly striving to exceed expectations and to make working with SEI a real, positive benefit for our clients. And based on our most recent client satisfaction survey*, we're succeeding.

95%

of clients
responding
would be likely
to recommend
us to another
colleague or firm

95%

would choose
us again if
selecting a
new provider

A COMMON SENSE APPROACH

We take a simple approach to client service that focuses on three key themes:

- **Get close to clients and stay close** – To help you succeed, we must have an in-depth understanding of your situation, goals, and how you define success. So our client service and advice professionals maintain close contact in order to make sure our solutions continue to meet your needs, however and whenever they change.
- **Always be there and exceed expectations** – Our collaborative environment and entrepreneurial spirit help us attract and keep high-quality professionals who genuinely care about the well-being of their clients.

In our most recent satisfaction survey, SEI relationship managers received a 97% satisfaction rate from clients, and more than 96% of clients responding agree that their relationship manager is dependable, trustworthy, and understands the needs of their organization.
- **Empower clients through communication and education** – Our solutions are designed to reduce your day-to-day burden so you can focus on key strategic decisions such

as asset allocation and evaluating new asset classes. But prudent decisions require that you understand issues impacting your program. In addition to our in-person meetings, we offer a variety of programs to support you:

- **Select Research Forum** – Presentations from industry and SEI experts keep you updated on investment and industry-related topics
- **4front Newsletter** – Research and updates, white papers, and product announcements on a quarterly basis
- **Global Symposium** – Come together with other clients to hear the latest updates, perspectives, and solution enhancements; while you're at it, share ideas and best practices with your peers
- **Email Alerts** – Communications on breaking industry news, legislative issues, market events, and product updates
- **Your Client Web Site** – Real-time, 24/7/365 account information and access to all the latest research and publications from SEI

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Based on responses to our client satisfaction survey, it looks like our efforts are paying off:

- 97% of clients agree that delegation of manager selection and monitoring gives them more time for strategic decisions (such as asset allocation and evaluating new asset classes)
- 95% of clients agree that the increased advice and education help them make better asset allocation decisions
- 95% feel that they have a better understanding of their overall risks and appropriate methods for managing them; and,
- 91% say that they are better able to control the direction of their portfolio/plan

What do our clients say about our service?

“Always proactive and responsive”

“The fully integrated nature of the SEI solution combined with the emphasis on liability management sets SEI apart from most other traditional, fragmented investment consultant/service provider models available in the market-place.”

“Simply put, they have delivered everything they have ever said they would in a timely, effective manner.”

“High-quality organization fits our needs extremely well”

“SEI has the experts and the tools we need to manage our pension plan in the complex financial world. The team has taken the time to understand our business and our mission as a not-for-profit organization.”

The list below is just a sampling of the organizations that have chosen SEI.†

- The Brinks Company
- Comcast Corporation
- IBEW Local #380, Collegeville, PA
- Ohio State University Alumni Association, Inc.
- Panasonic Corporation
- SAP America, Inc.
- The JM Smucker Company
- Connecticut Pipe Trades, Meriden, CT
- Wright State University

† Representative clients are selected by SEI to illustrate a sampling of SEI's client base, but may not necessarily endorse all of the services provided by SEI.

Want to hear more? Contact us at 866.SEI.2441 to learn more about how SEI can serve your organization.

*SEI annual client satisfaction survey, July, 2010. Services provided by SEI Investments Management Corp, a wholly-owned subsidiary of SEI Investments Company.