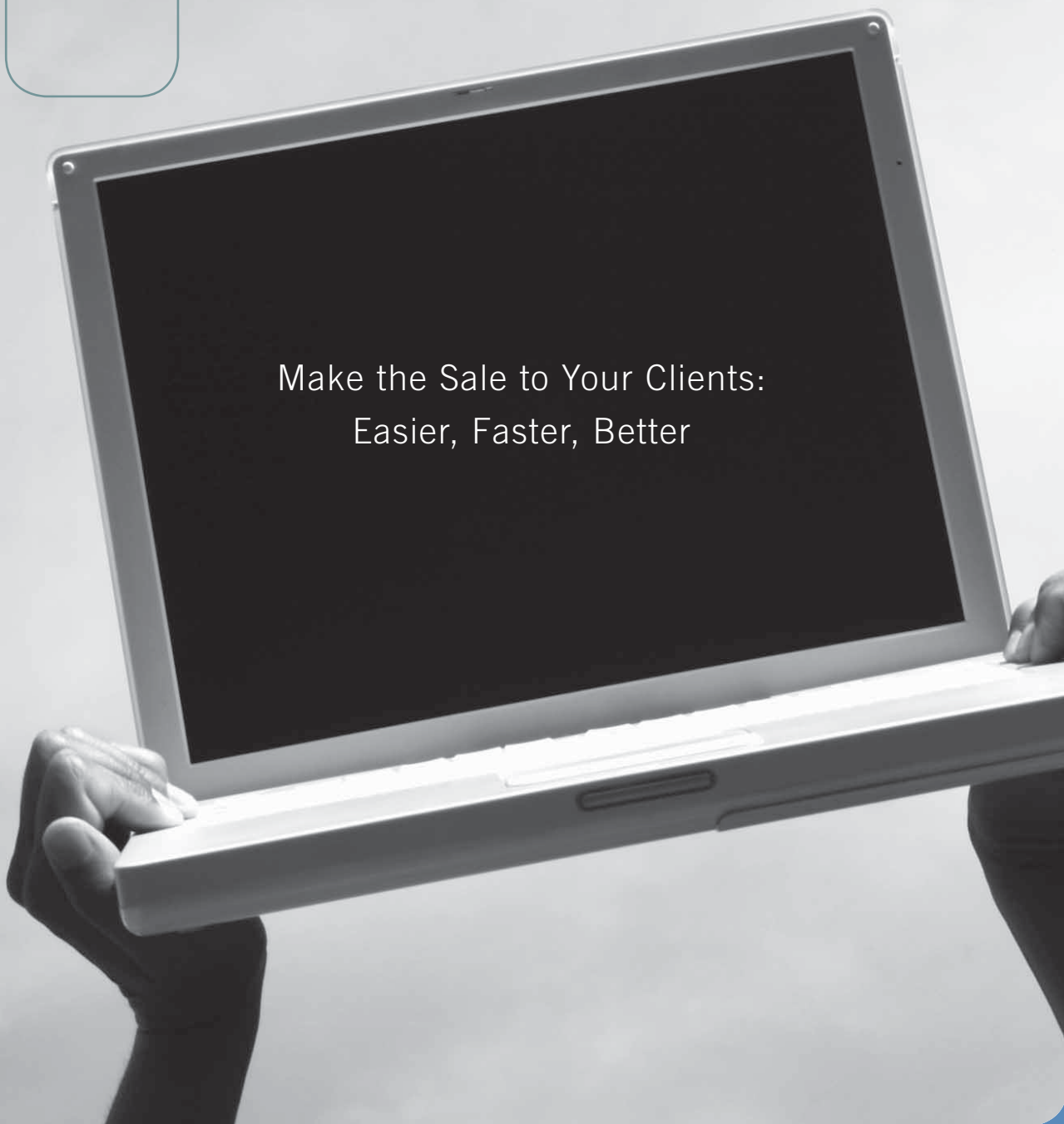


SEI New ways.
New answers.®

The SEI Proposal System

Make the Sale to Your Clients:
Easier, Faster, Better



The SEI Proposal System is a new tool that lets you generate professional and personalized recommendations to your clients and prospects quickly and compellingly.

The SEI Proposal System has been designed to present a comprehensive investment plan and investment strategies so dynamically that it becomes your most powerful and compelling sales tool.

A Single Solution.

Regardless of your client's situation, goals, current financial resources, or risk tolerance, the SEI Proposal System is the single system you need to generate a proposal. This integrated application streamlines the proposal process, guiding you intuitively and efficiently through the steps to produce a customized and client-friendly investment proposal accompanied by an Investment Policy Statement.

The SEI Proposal System allows you to generate a comprehensive, quality investment proposal in minutes. You no longer have to wait for a proposal to be developed by a third-party provider and thereby lose precious time. You can work up the proposal right from your desk or laptop immediately upon completing a simple client goals assessment. This results in a personalized, actionable proposal, significantly shortening your sales cycle and increasing the likelihood of a prospect turning into a new client.

While the SEI Proposal System allows you to complete investment proposals on your own easily and efficiently, SEI representatives stand ready to collaborate with you in order to assist you in the sales process for your high-level clients.

A Compelling Presentation.

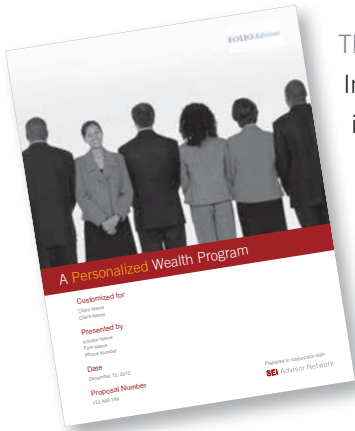
The SEI Proposal System provides you with more than an investment proposal. It supplies you with a compelling presentation and a powerful sales tool that:

Promotes You and Your Company.

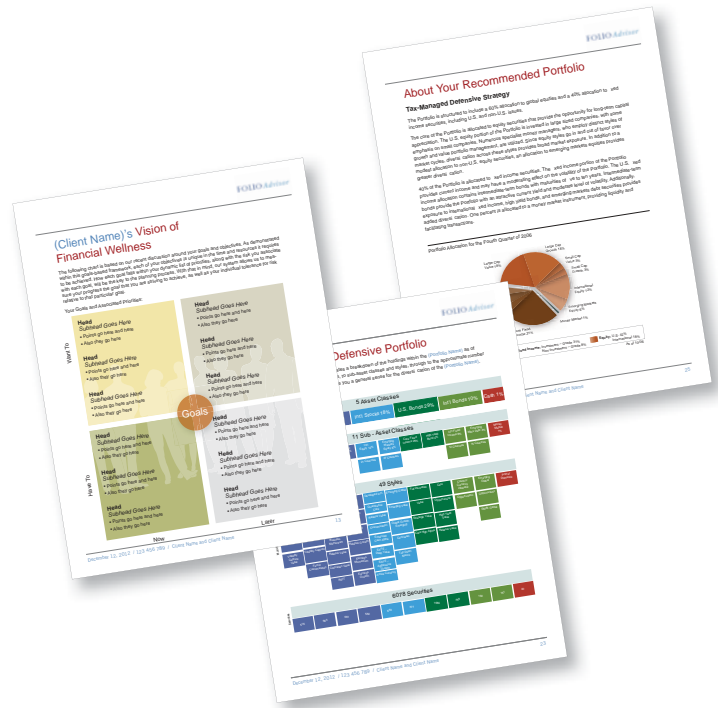
All investment proposals are co-branded with the advisor and SEI. Each one features your logo, your name, and your firm's profile. The proposal presents you, your company, and SEI clearly and persuasively to your prospective client: it makes the case for choosing *you*.

Speaks Directly to Your Client.

With the SEI Proposal System, you can choose between two fully-customized proposal format options to meet specific client needs. Each proposal option produces full-color output with attractive and helpful graphics.



The Goals-Based Proposal. In this format, your client's investments are shown within the context of his or her life, goals, and desires. The style is narrative and personal. It tells a clear story, and leads your client step-by-step to the investment solution that works best to meet their goals.



The Traditional Proposal. Here, you provide your client with a more factual, straightforward proposal, rather than integrating life goals and narrative into the presentation. The customized investment program is presented to demonstrate an overall plan as well as the investment recommendations.

Presents Comprehensive Data.

When you use the SEI Proposal System, you automatically generate a full set of documents for your client: the investment proposal and the Investment Policy Statement, plus detailed analytical reports and all the corresponding forms to establish new accounts. The investment proposal is an effective sales presentation, walking your client through the advantages of choosing you, SEI, and the customized investment strategies that are being recommended. The Investment Policy Statement delineates comprehensive data about the client and the investment strategy, including:

- portfolio implementation
- hypothetical performance charts

Offers Complete Flexibility.

Because you are in complete control when you use the SEI Proposal System, you not only generate a proposal within minutes for your client, but you can also make changes to it as needed as you discuss the details with your client or as your client's circumstances change over time. You can then produce an updated proposal immediately for your client's review and approval.

Begin using the SEI Proposal System for all your investment proposal needs!

How To Access The SEI Proposal System

- 1 Watch for an e-mail with your temporary username and password.
- 2 Go to www.SEIBusinessBuilder.com and use your temporary username and password to login.
- 3 Run a proposal and see the results for yourself!

If you have any questions about how to access and utilize the SEI Proposal System, call your SEI Relationship Team at 1-800-SEI-1003.

This Proposal was developed using proprietary investment modeling systems designed by SEI Investments Management Corporation, a wholly owned subsidiary of SEI Investments Company. The advisor is solely responsible for determining the suitability of this Proposal for the Investor, including the suitability of the asset allocation strategies and any money manager, mutual fund, security or asset included in the Proposal.

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New answers.®