

An introduction to SEI and your client team

FIRST NAME,

We are delighted to welcome you to SEI! As your dedicated client portfolio manager and on behalf of the entire team, I would like to take this opportunity to provide you with some information about your strategic partnership with us. SEI is a strategic partner in an effort to maximize return and minimize risk for its investment program. We are committed to helping the foundation achieve its investment goals.

We are also passionate about providing consistent and relevant client education and communication, and we believe that familiarity with your investment provider and team is a critical component of a successful strategic partnership. Please view these **videos** showcasing our commitment to colleges/universities, a virtual tour of our Oaks, PA, headquarters and a message from SEI's CFO and Institutional Group President.



A video demonstrating our specialization and commitment to higher education institutions, helping to resolve the unique and complex financial challenges they face today and in the future.



A virtual tour of our Oaks, PA, headquarters that features unique working spaces, artwork from emerging artists and a thriving culture.



Our CFO Dennis McGonigle and Institutional Group President Paul Klauder share how we bring an established OCIO program tailored to your needs and act as an extension of your team.

Client Communications Portal

As your OCIO, you count on us to provide up-to-date information and our latest perspectives, especially during uncertain times that can significantly impact the markets. Our portal features the latest commentaries from our Investment Management Unit (IMU) experts, webcasts, market perspectives and more to keep you informed about our positioning and outlook during these challenging times.



Our Economic Outlook

All clients receive regular communications about our latest views on the economy and market performance. [Read our economic review and outlook.](#)



Please contact me or Jeff if you have any questions.



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