

**SAMPLE CLIENT COMMITTEE SURVEY**

**1. What is the biggest challenge facing the [ORGANIZATION NAME] committee?**

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**2. How do you define success for your committee over the next three to five years?**

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**3. Please indicate the importance of the following items in examining the investment performance of the portfolio.**

	Most important	Least important	Not important	I have no preference
"Absolute" comparisons - comparing actual returns to an "absolute" percent return target	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
"Relative" comparisons - comparing actual returns to various market indices and/or other performance systems (S&P 500, Bloomberg Barclays US Aggregate Bond Index etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using both "absolute" and "relative" measures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comparing performance to similar organizations/peers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. What are the five most important components of an effective strategic partnership with your investment management provider? (Please indicate your top five 1-5)

	1	2	3	4	5
Experience working with organizations like ours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Breadth of investment offering (including alternatives)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improved governance process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Risk management process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ongoing committee education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Client service team and resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manager research and selection expertise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Asset allocation and advice process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost savings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Additional fiduciary oversight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Proactive, nimble investment decision-making	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Simplified operations/administration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. Please indicate your viewpoint on the role each of the asset classes below should have relative to your portfolio.

	We should utilize active strategies for this asset class	We should utilize passive strategies for this asset class	This asset class should not be included in our portfolio	We would like additional education on this
U.S. Equity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Emerging Markets Equity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
International Equity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fixed Income	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
U.S. High Yield	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Emerging Markets Debt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Low-Beta Equities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TIPS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Real Estate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Distressed/Opportunistic Strategies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Global Private Assets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hedge Funds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. Investment risk can be defined in many ways. Which of the following best describes your definition of risk? Check all that apply.

- The possibility of not meeting a planned spending objective
- The possibility of not achieving an established target rate of return
- Long-term erosion of the purchasing power of the portfolio
- Portfolio volatility (i.e. the total portfolio value fluctuating even if it is essentially in phase with general market fluctuations)

Other:

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7. Is there anything else you think we (SEI) should know about [ORGANIZATION NAME] and/or your committee to better serve you as your investment provider?

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Name (optional)

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Email address (optional)

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Information provided by SEI Investments Management Corporation, a registered investment adviser and wholly owned subsidiary of SEI Investments Company.

- Investing involves risk including possible loss of principal. Investments in certain asset classes may involve additional risk. Alternative investments are subject to a complete loss of capital and are only appropriate for parties who can bear that risk and the illiquid nature of such investments. There can be no guarantee risk can be managed successfully.

- The S&P 500 and Bloomberg Barclays US Aggregate Bond Index are broad market indices of the equity and fixed income markets respectively. Indexes are unmanaged and one cannot invest directly in an index.

- Beta is a measure of the volatility—or systematic risk—of a security or portfolio compared to the market as a whole