



Transform your wealth management business.



**Revolutionise how
you manage wealth,
embrace change, and
protect the future
of your business
with the SEI Wealth
Platform.SM**

Picture the future of wealth management.

You have real-time, enterprise-level views across your entire wealth management business, leading-edge technology through a single unified infrastructure, and the ability to exceed client expectations by providing a holistic view of client relationships. You have a system designed to continually support regulatory reforms to power the future you want. The future is here.

Our value proposition

We believe the future of wealth management is rooted in providing a personalised and connected experience, fueled by the intersection of people, process, and technology. Our robust solution provides leading-edge technology that's customised to your business and a partner that's committed to powering your growth. We provide services and operations that streamline your wealth management infrastructure so you can increase efficiency, embrace change with confidence, and focus on what's most important to you—your clients.

Key design principles

Single infrastructure

- Single platform
- Open architecture, multicurrency
- Single code based
- Fully hosted and web deployed

Straight-through process

- Workflow automation
- Exception-based transaction management
- Transparency

Global reach

- Multicurrency processing and reporting
- 24/7 Business support and technical model
- Adaptable business operating model
- Facilitate various pricing models

Client experience

- Client-centric relationship model
- Best practice business processes
- Full life cycle management

The SEI Wealth Platform is an end-to-end solution designed to manage evolving needs, operate seamlessly in global markets, and drive efficiency throughout your wealth management business. Deploy your capital more intelligently, while eliminating complexity and future proofing your business. **Start your future now.**

Platform capabilities.

Services designed to enable growth, reduce costs, manage risk and differentiate your business.

Front office services

- Adviser dashboards
- Prospecting and proposal
- Client reporting packages
- Client website and mobile app

Investment management

- Model management
- Asset allocation
- Trade order management
- Bulk account management
- Performance measurement
- Investment compliance
- Alternative assets

Middle office services

- Client and account management
- Cash processing
- Fee processing
- Asset transfer
- ISA administration
- Firm-specific assets

Information management services

- Audit and regulatory
- Document management
- Reporting
- SLA management
- Management information

Back office services

- Onshore and offshore custody
- Asset services
- Cash settlement
- Trade settlement
- Corporate actions
- Reconciliation
- Tax processing
- Aggregation

Infrastructure services

- Data integration
- Business continuity
- Hosting
- Information security
- Release management
- Production services
- System administration

Service availability may vary by jurisdiction.

Go beyond today's expectations.

Our strategic partners choose us because our scalable, robust platform can help:

Drive growth

- Single, hosted processing platform for all accounts
- Straight-through processing on a highly scalable, asset-agnostic platform
- Remove a significant number of manual processes, designed to reduce associated risk
- Improve speed to market and enhance processing/servicing capabilities
- Support organic growth and acquisitions

Enable confident decision making

- Enable strategic investment in core competencies rather than support services
- Predictable and transparent cost structure for growth with preplanned scalability
- Scalable operational infrastructure enabling rapid, cost-effective deployment
- Capital efficient—enabling firms to consolidate vendors and retire multiple platforms

Protect the future of their business

- Relationship with a dedicated investment processor
- Deliver a straight-through set of business processes
- Reduce, mitigate and transfer operational risk

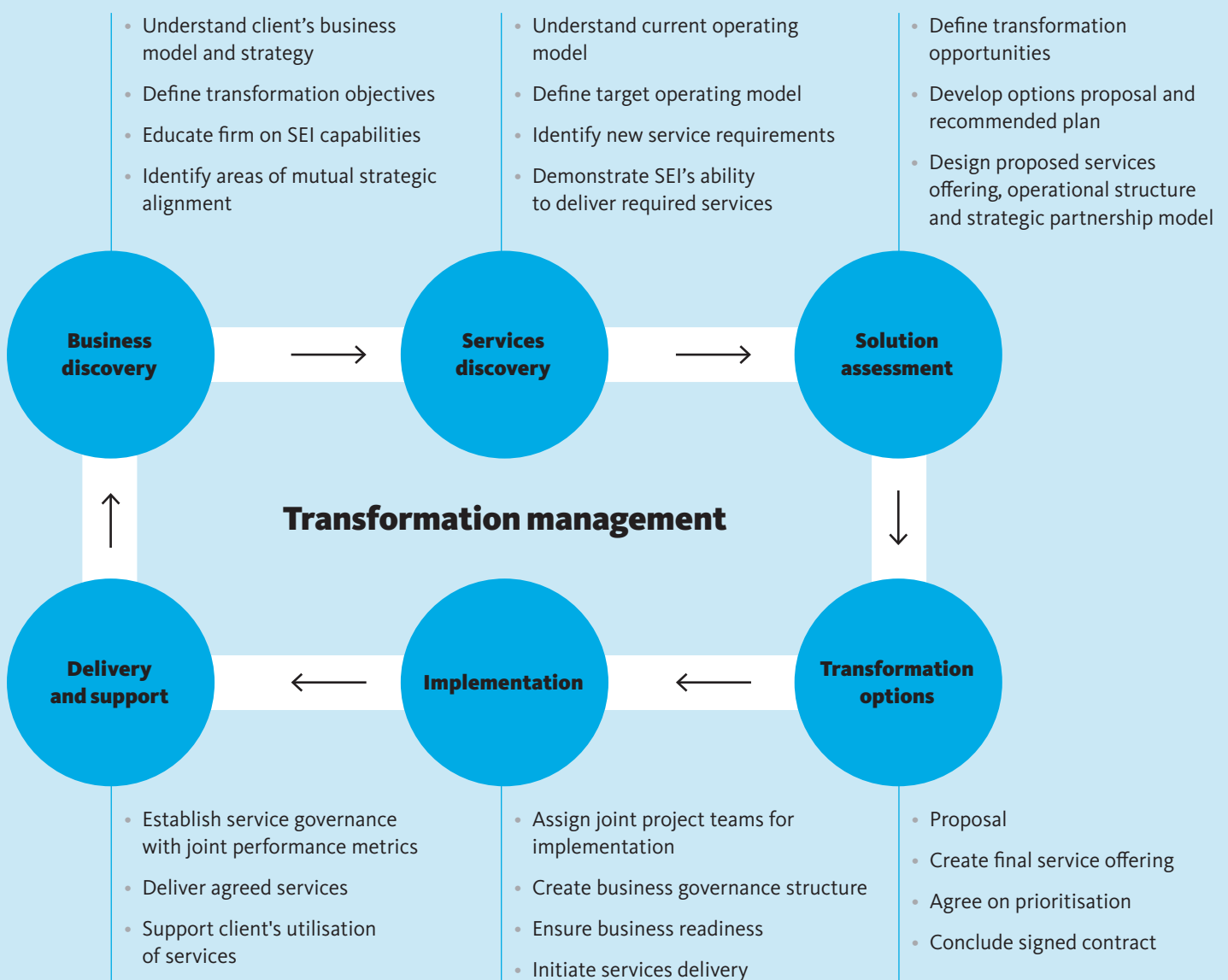
“This solution integrates SEI’s capabilities in investment management, processing and operations, creating a next-generation solution for institutional and private client wealth managers.”

— Al West, SEI Founder and Chairman

A true strategic partner to help deliver confident change.

Keeping pace isn't solely about technology, you also need the right people and processes to help you transform your business.

Our proven methodology, coupled with the SEI Wealth Platform's flexibility, provides a truly different approach to the way we work with you. The Business Transformation Process helps to continually identify the distinct requirements and objectives of your firm and ensure they are fully understood and appreciated. The perpetual six-step process helps to determine the way we configure our solutions and services to best suit your needs and the continually evolving needs of your clients.



Innovative, comprehensive solutions for creating and managing wealth.

SEI is a leading global provider of institutional and private client wealth management solutions. We help private banks, independent financial advisors, institutional investors, and investment managers create and manage wealth.

Empowering client success

- Serve over 100 banks and other wealth management processing clients in the U.S. and U.K., with more than 7,500 financial advisors, and 465 institutional investor clients*
- Process over 1.4 million end-client accounts*
- Manage or administer £1.05 trillion in hedge, private equity, mutual fund and pooled or separately managed assets**
- Trade in 45 countries, 43 currencies, 131 stock exchanges**

Successful, financially sound

- Founded in 1968, a publicly traded company since 1981 (NASDAQ: SEIC)
- Revenue £1.65 billion, income before taxes £505 million*
- Cash and cash equivalents of £707 million*
- Approximately 4,800 employees globally**

Innovative market leader

- Significant investment in new global wealth processing infrastructure
- A leading institutional manager of managers
- A pioneer of wealth management processing and asset allocation strategy

*Figures accurate as of 31 December, 2022. Currency conversions are as of 31 December, 2022. 1 USD to 0.82908 GBP.

**Figures accurate as of 31 March 2023. Currency conversions are as of 31 March 2023. 1 USD to 0.80951 GBP.



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Get in touch today to see how the SEI Wealth Platform can power the future of your business.

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The value of an investment and any income from it can go down as well as up. Investors may not get back the original amount invested.