



ADVISOR SERVICES: COLLABORATE

SEI Communities.

To ignite a movement for universal access to wealth and advice, we start by building a sense of community among independent financial advisors.



Join our 500+ financial professionals to network, learn, and grow together.

Connect and collaborate with peers in the industry to share stories and ask questions that can help lead each other to success. Whether you're an RIA navigating the complexities of running a business or a seasoned practice looking to optimize workflows, you're not alone and there's likely someone in a community that has been through, or is going through, the same situation as you.

Each community will have:

- Opportunities to attend in-person and virtual events to network and learn best practices from your peers
- Accessible resources to learn about new technologies, trends, and best practices
- A core governing group that will be your contacts for questions and help facilitate conversations
- A dedicated digital community to ask questions and get answers from your fellow community members in real time

SEI Communitates.



RIA community

As RIAs, we all have a unique story to tell—a story of independence, coupled with the complexities of running a small business.

You should join if: You own or are looking to start an RIA.



Women advisors community

Our passion is helping our clients reach their financial goals and, as women, we have common advantages and vulnerabilities.

You should join if: You identify as a female advisor.



Operations community

Sometimes staying on top of best practices, technology enhancements, and day-to-day administrative tasks can be challenging. A little help from partners and peers could go a long way.

You should join if: You are an operations manager, solo advisor, or any other role that handles office operations.



Growth community

Perhaps you've mastered operational processes and the new priority is growing your book of business. Growth community members accelerate progress by amplifying best ideas and holding peers accountable.

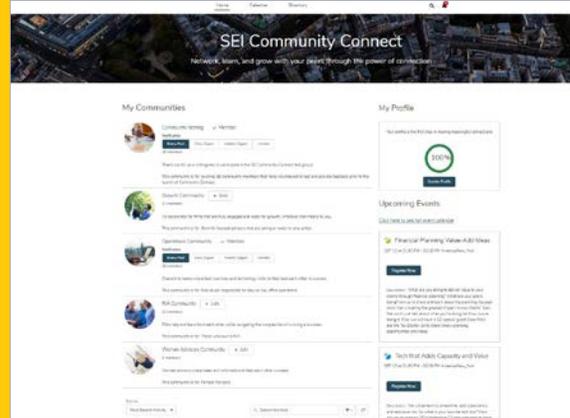
You should join if: Your firm uses the SEI Wealth PlatformSM and is looking to expand on existing capabilities and practices.

Get started today.

The SEI Community Connect portal is your gateway to access the resources and network available to you when you become a community member.

Features at a glance:

- Register for community calls and events
- Interact with others by posting a question or poll to a community feed
- Access key takeaways and notes from in-person and virtual community sessions
- Browse the community member directory and connect with peers based on filters like practice size, areas of expertise, and tech stack.



1

Access the portal.

SEI Wealth Platform (SWP) users can access the SEI Community Connect portal from the Links button on the Advisor Center homepage.

Tip: Set up your profile to make it easier for members to find you and make more meaningful connections.

2

Join a community.

On the Home tab, you'll be able to browse the communities available to you and join one or more with the click of a button.

Tip: Browse your community feed pages—explore content, answer questions from your peers, or pose a question of your own.

3

Register for a community event.

Toggle to the Calendar tab to view and register for an upcoming event and begin cultivating a sense of community.

4

Find community members.

Utilize the Directory tab to view a comprehensive list of community members and their profile attributes. Advanced search capabilities allow you to sort members by granular firm details like firm pricing model, areas of expertise, practice size, and more.



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Learn more.

SEI delivers technology and investment solutions that connect the financial services industry. With capabilities across investment processing, operations, and asset management, SEI works with corporations, financial institutions and professionals, and ultra-high-net-worth families to solve problems, manage change, and help protect assets—for growth today and in the future.

Important information

Independent Advisor Solutions by SEI is a strategic business unit of SEI Investments Company (SEI). Platform services provided by SEI Global Services, Inc., a wholly owned subsidiary of SEI.

Please check with your firm or firm's home office prior to requesting access to the SEI Communities. SEI is not responsible for monitoring and archiving content shared by financial advisors within the Communities.

SEI does not have the ability to discuss investment-related topics within the Communities.

Access to the SEI Communities is limited to financial advisors currently utilizing SEI solutions.