Business Transition Services

3 ways SEI makes it easy.

Your technology and custody platform is more than infrastructure to deliver advice – it elevates your value proposition and the experience you provide your clients.

1 A dedicated team of specialists.

We know that every business is different and requires a thoughtful approach to transitioning providers. Our Business Transition Services team is comprised of experienced professionals singularly focused on ensuring a smooth transition. With decades of combined industry experience and the perspective gleaned from transitioning more than 750 advisory businesses representing over $11 billion in assets in the last 12 years*, our team understands what it takes to make that transition successful – for you, your staff, and your clients.

2 Taking transition tasks off your plate.

Our Business Transition Services team acts as more than a guide – we're here to do the work for you in as many ways as possible. When you transition your business with SEI, we handle many of the manual and administrative tasks to help take some of the work off of your plate, including:

- Preparing proposals and investment policy statements
- Helping map existing client portfolios to SEI
- Transitioning in-kind assets to SEI Private Trust Company
- Liquidating assets with the goal of no brokerage or transaction fees

*Ending in December 2021

3 Preparing client communications.

We understand one of your primary concerns about switching to a new custodian and technology provider may be the perception clients will have. A well-planned and skillfully communicated transition can not only allay any fears, but it can actually be an opportunity to strengthen your relationship with clients – and even uncover new assets that you weren't yet managing. Here's how we help you realize those opportunities with prepared client communications:

- **Tools you can use**
  We've developed a number of templates that you can pick up, customize, and use to send effective written communications to your clients to help them understand exactly what is happening throughout the transition process.

- **Streamlined paperwork process**
  We provide comprehensive support and guidance on SEI paperwork to open and fund accounts organized by family. The paperwork can immediately be sent to your clients for electronic signature or printed for physical signature. We even include prepaid UPS slips and envelopes where needed.

- **Client orientation meetings**
  Our team is available to meet with your clients through face-to-face meetings, over the phone, or in a small group setting to answer questions and offer assistance throughout the transition process.

We understand that transitioning your business is a significant event.
That's why we provide resources to help you along the way.

Let us connect you to what matters most.

To start your business transition today, connect with an SEI Regional Director at 1-888-734-2679.
Have questions about our Business Transition Services? Send us an email at advisortransitionteam@seic.com

seic.com/advisors

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