

EBix Smart Office.

SEI Strategic Partner



Leverage our relationships to get discounted pricing on valuable services.

As part of our continued commitment to help advisors power wealth and focus on client relationships, we have established strategic partnerships with several key business service partners to help you **reduce costs**, **save time** and **increase efficiencies** to run a more successful firm.

EBix Smart Office

A robust practice management solution that helps advisors analyze, service and communicate more effectively with clients using key metrics and SmartOffice's unique, multi-disciplined, financial services-specific data model and integrations.

Contact

crmsales@ebix.com

Discount

Performance Package (single user) List price \$70/month SEI price \$60/month

Advisor Bundle (2-users) List price \$135/month SEI price \$100/month

Producer Group Bundle (5-users) List price \$235/month SEI price \$200/month

Website

www.ebixcrm.com

Important information

SEI is not affiliated with any firms mentioned herein. SEI Global Services, Inc. has contracted with listed vendors to provide these services to select Independent Advisor Solutions by SEI clients. Information provided by SEI Investments Management Corporation, a wholly owned subsidiary of SEI Investments Company.