

Wealthbox.

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.

Wealthbox

Wealthbox is a CRM software application that helps financial advisors manage their clients and collaborate as a team. Integrated with custodial platforms and complementary wealth-tech products, Wealthbox's modern product design offers simplicity in the user experience that's combined with powerful CRM features. Wealth management firms, advisor networks, and broker-dealers use Wealthbox to help them serve clients, streamline operations, and grow their businesses.

Contact

sales@wealthbox.com

Discount

10%

Website

<https://www.wealthbox.com/integrations/sei/>

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.