Helping to connect you to a better future.

SEI's global reach and connectivity can help you build the future you want.

SEI is a leading global provider of wealth management solutions.

We help you create and manage wealth by providing investment solutions that are both comprehensive and innovative.

50+ years

strong and publicly held since 1981

40+ years

confidently managing money

30+ years

steadfastly serving financial advisors

Over $1.9 trillion (CAD)

managed or administered in hedge, private equity, mutual fund, and pooled or separately managed assets globally

5,000+

global employees in offices worldwide

As of December 31, 2023

A goals-based investment framework.

Your financial advisor will take care to understand your goals and then build an investment strategy to help you reach them. At SEI, we're here to help both you and them.

Our global reach means you have access to flexible investment solutions and educational content that keeps you up to date on changing market conditions that may affect your investments.

Be focused

We bring a focus on diversification, risk management, and goals-based investing, but that's not all that sets us apart. Our 'manager-of-managers' approach and active management philosophy seek to help enhance your overall returns and achieve your goals.

Make confident decisions

Our team is in your corner. When you invest with SEI, you're backed by an organization with deep expertise in fund manager selection and portfolio construction. From research to asset allocation and beyond, we can help you feel confident in the decisions you make with your advisor.

Power growth

Wealth doesn't happen by accident. It's the potential end result of a goals-based investment framework that helps you grow your investments over time. Our guidance and global expertise are designed to help you stay the course throughout your investment journey.

Long-term institutional clients[1]

SEI has ranked as a largest outsourcer based on worldwide institutional outsourced assets under management by *Pensions & Investments* since 2011.

LVMH MOËT HENNESSY . LOUIS VUITTON

Mercedes-Benz

MITSUBISHI MOTORS

Panasonic

PEARSON

SMUCKER'S

SEI Investment Management Unit: Deep and broad resources.

Using the same sophisticated investment philosophy and process developed to serve institutional investors, the SEI Investment Management Unit prides itself on conducting research in an open, academic environment that reflects SEI's entrepreneurial culture. Our global research and portfolio management efforts include more than 140 team members based in Oaks, Pennsylvania, London, and Toronto, with 61% holding their CFA® and/or advanced degrees.[2]

[1] Client list as of December 31, 2023. Represents a partial list of current global institutional clients, selected from SEI's complete client roster, all of which are global, corporate defined benefit and/or defined contribution clients, have assets over $50 million, and have provided SEI with permission to use their names in marketing materials. It is not known whether the listed clients approve of SEI or the advisory services provided. The inclusion of particular clients on this list does not constitute an endorsement or recommendation of SEI's products or services by such clients.

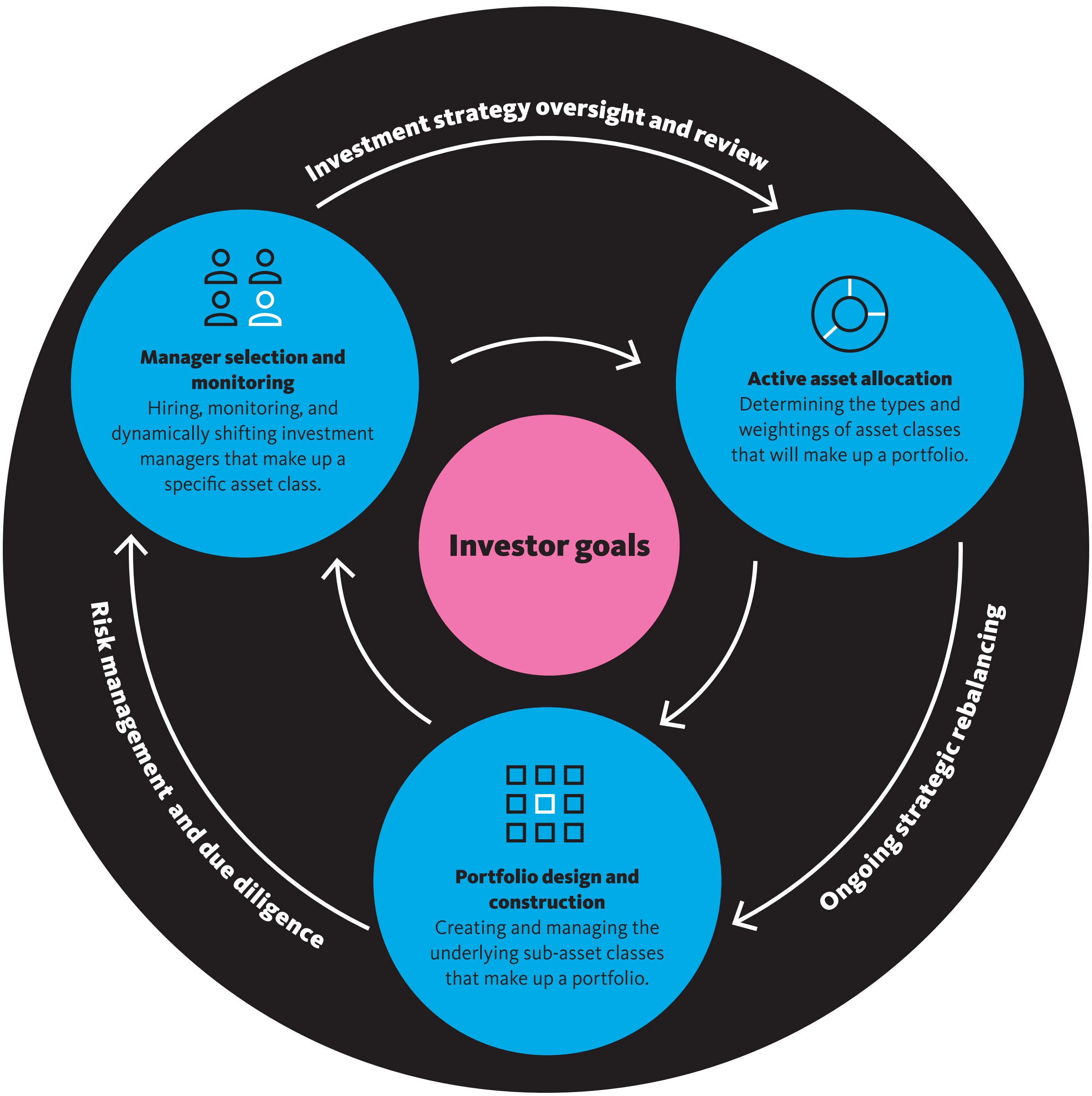
[2] As of December 31, 2023

Optimizing your investment outcomes.

SEI has a long history of offering investors disciplined strategies that provide a high level of diversification across asset classes.

Our actively managed strategies are designed to capitalize on the long-term drivers of market performance and seek to enhance returns in a variety of market conditions. We closely monitor the financial markets and take action in volatile times so we can help diversify your portfolio in the short term and deliver consistent returns over the long term.

Our investment process starts with investor goals



To learn how SEI can help you, contact your financial advisor.

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seic.ca

About SEI Canada

SEI founded its Canadian business in 1983, pioneering innovative asset management techniques for institutional investors. Today, SEI offers integrated investment management and strategic advice solutions to help institutional investors achieve their organizational goals and fulfill fiduciary responsibilities. Capitalizing on its investment expertise, SEI began offering investment solutions to retail investors through investment advisors in 1994. The investment approach provides multi-manager, globally diversified strategies with an appropriate home-country bias for Canadian retail investors. SEI's goals-based strategies, strategic asset allocation strategies and asset class funds are available through select dealer relationships. For more information, visit seic.ca.

Important Information

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