



SEI CONNECT

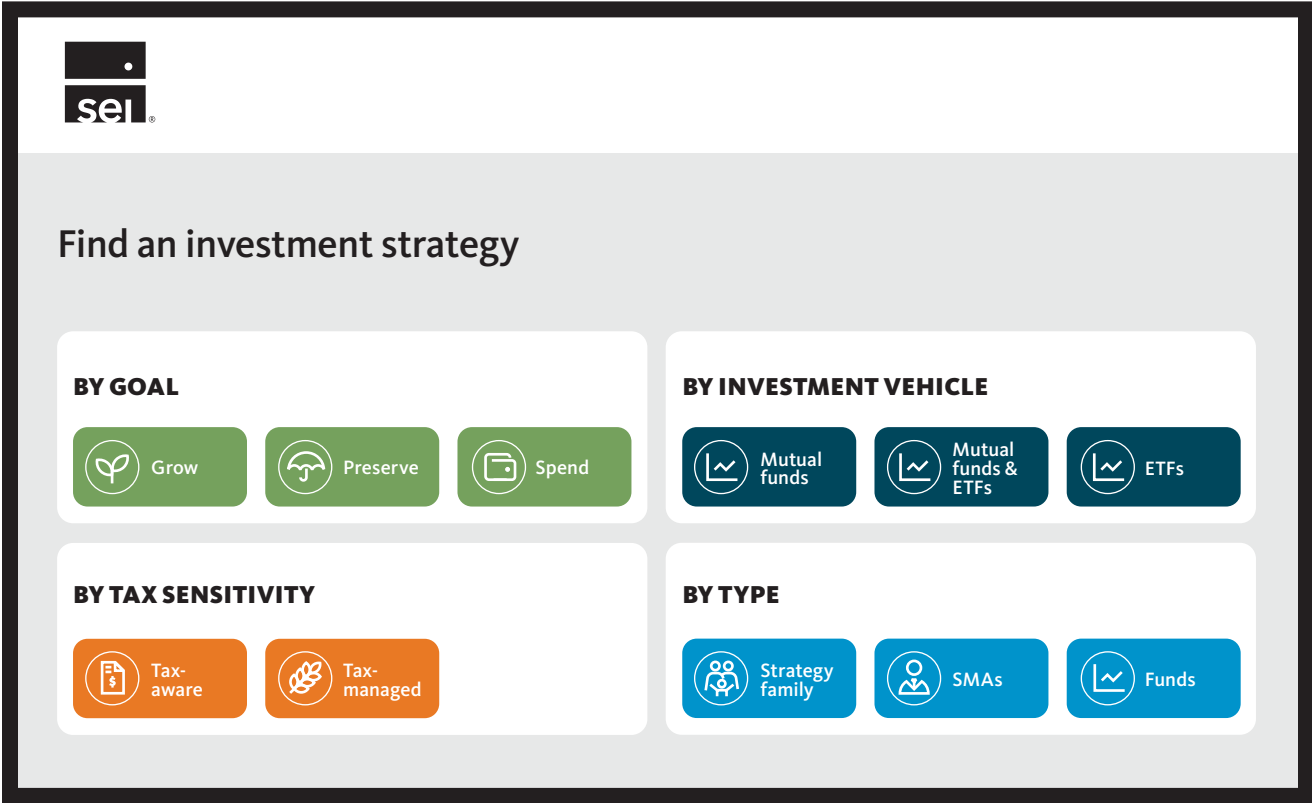
Portfolio Evaluator.

Find and compare investment strategies to help your clients achieve their goals.



Personalize the investment experience.

The Portfolio Evaluator is designed to help you identify best-fit investment strategies for your clients, no matter their timeline or goal. A streamlined investment research process can help you make efficient and informed decisions, together with your clients.



Key benefits.

Choice

Intuitive technology with advanced filtering capabilities empowers you to explore and select investment strategies with a true sense of autonomy.

A connected experience

The tool is seamlessly integrated within the Advisor Desktop, creating a unified experience and eliminating the hassle of managing separate logins.

Expert insight

Access market research and investment commentaries provided by our Investment Management Unit, designed to help you gain perspective.

Search, select, compare.

Browse SEI's options to pinpoint the most suitable choices based on a variety of filters. Whether you're seeking a ready-made solution or a custom portfolio tailored to specific client needs, evaluating your options has never been easier.

Goal

Whether you're looking to help clients grow, preserve, or spend their assets given their time frame, the Portfolio Evaluator can assist you in identifying potential options designed to help meet a variety of investment goals.

Grow

Growing assets involves setting clear objectives and maintaining focus on achieving them. These clients aim to build their portfolios and accumulate wealth over time.

Preserve

Having worked diligently to build their wealth, these clients seek to preserve their accumulated assets. Their goal is to manage the risk of loss, while helping to ensure they can continue their current lifestyle.

Spend

Clients in this category have invested wisely seeking to secure a steady income for when they need it. Their aim is to generate income from investments to meet their spending needs.

Tax Sensitivity

Helping clients keep more of what they earn by managing for tax efficiency is a cornerstone of our investment philosophy. Overlaying this filter can ensure you're viewing options that utilize tax-efficient vehicles and can help mitigate the negative effects of taxes on investment income and capital gains.

Tax-aware

Tax-aware strategies utilize tax-efficient vehicles.

Tax-managed

Tax-managed strategies seek to opportunistically harvest losses across securities through tax-loss harvesting.

Investment vehicle

Explore diverse investment strategies by strategy family, ranging from multi-manager fund strategies, SEI-managed ETFs, third-party ETF Strategies, Managed Account Solutions (SMA & UMA), and premier strategic partners.

Mutual funds

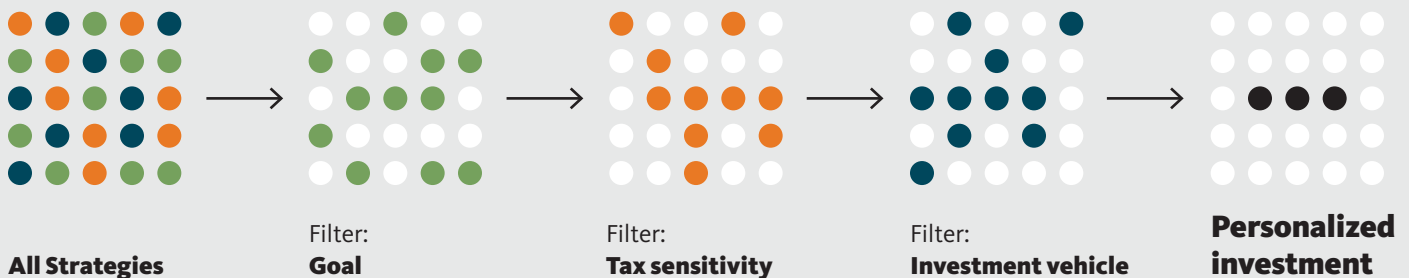
Mutual funds + ETFs

ETFs

The strategies all share a common philosophy rooted in strategic asset allocation, diversified portfolio design, and active portfolio and risk management.

Putting it all together.

These overlaid filters, paired with market insights, work to provide an informed consideration set that is highly personalized to your clients' needs.





Discover SEI®

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 futures—for growth today and in the future.

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Important information

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Investing involves risk including possible loss of principal. There is no guarantee investment objectives will be achieved. Risk management may not always be successful. Diversification may not protect against market risk. Consider the Strategies' investment objectives, risks, charges, and expenses carefully before investing.

For those portfolios of individually managed securities, SIMC makes recommendations as to which manager will manage each asset class. Upon SIMC's termination of a manager from the program, SIMC may recommend a replacement money manager and the investor has the option to move the account assets to another custodian or to change the manager.

Certain Strategies contain funds that are subject to tracking error risk, or the risk that the fund's performance may vary substantially from the performance of the index it tracks as a result of cash flows, expenses, imperfect correlation between the fund and the index, and other factors. This risk is magnified when sampling a benchmark index as the strategy may not track the return of its benchmark index as well as it would have if the strategy purchased all of the securities in its benchmark index.

Tax-management strategies utilize tax-loss harvesting. Tax-aware strategies utilize tax-efficient vehicles.

SIMC does not represent in any manner that the tax consequences described as part of its tax-management techniques and strategies will be achieved or that any of SIMC's tax-management techniques, or any of its products and/or services, will result in any particular tax consequence. The tax consequences of the tax-management techniques, including those intended to harvest tax losses, and other strategies that SIMC may pursue are complex and uncertain and may be challenged by the IRS. Neither SIMC nor its affiliates provide tax advice.

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