SEI Marketing Vendor Guide.

Marketing basics.

Foundational to marketing efforts is having honed messaging and an optimized website for lead nurturing.

Website

44% of firms say website design that allows for digital lead nurturing and conversion is an efficient marketing tactic.[1]

For those who do not yet have a website or digital presence

fmg*

fmgsuite.com/sei

Levitate

levitate.ai/

Brand components

For those who have not yet set up basic brand components

Components	No cost	Costs will apply
Try an AI logo	•	
Ideal client persona builder tool	•	
Value messaging framework	•	
Value messaging activation	•	
Graphic designer**		•
Copywriter**		•

"The one thing that we realized was that all we need to do is create an exceptional client experience. It's the conversations we have, it's the little giveaways we have, we do little things throughout the year that people ask, "Where did you get that?" The changes that we made and dedication to client experience is extraordinary in the growth that we've seen."[2]

–Roger David, SEI client since 2020

New client growth.

Tactics to grow using your strengths and opportunities and/or what has worked in the past.

Content marketing

42% of firms say using social media networks (actively posting content and interacting on social media networks) is an effective marketing tactic.[1]

For those who want to reach an established audience with knowledge sharing, community building, or who want additional client touch points

fmg*

fmgsuite.com/sei

Levitate

levitate.ai/

advisorstream* A Broadridge® Company

advisorstream.com/

Referral marketing

For advisors with raving fans, who are looking to grow with the right people. Also check out our Sharable Moments Events & Gifting guide.

Testimonial iQ | Compliance-First Platform For Social Proof

Events

34% of advisors say hosting networking events (e.g., seminars) is an effective marketing tactic.[1]

For advisors with strong presentation skills and/or specialization

acquireup

acquireup.com/

SEI lead generation Events & Gifting guide (coming soon)

Outsource

For advisors looking for a do-it-for-me marketing experience

NIFTY ADVISOR SUPPORT

niftyadvisorsupport.com/digital-marketing/

Current client growth.

Tactics to build strong referral rates and/or retention.

Communications

For advisors looking to make critical client touch points

Levitate

levitate.ai/

CLEARNOMICS

clearnomics.com

remindermedia *

remindermedia.com/sei/

Gifting & Events

40% of advisors say community involvement and 34% of advisors say hosting networking events (e.g., client appreciation events) are effective marketing tactics.[1]

For advisors looking to reinforce and deepen relationships with clients and their networks

Check out our Sharable Moments Events & Gifting guide.

For advisors looking for additional recommendations or business consulting, contact your Business Development Representative or reach out to your peers in SEI Community Connect.

[1] InvestmentNews Pricing, Profitability, and Compensation Study, 2023

[2] Roger David, Founder and Principal, Rinvelt & David, LLC. SEI Client since 2020

*Services offered through a strategic partner of SEI that is not affiliated with SEI or its subsidiaries.

**Ask your SEI Business Development Representative for designer and copywriter recommendations

Visit **seic.com/growthlab** for a collection of actionable practice management toolkits.

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240062.08 IAS 12/24