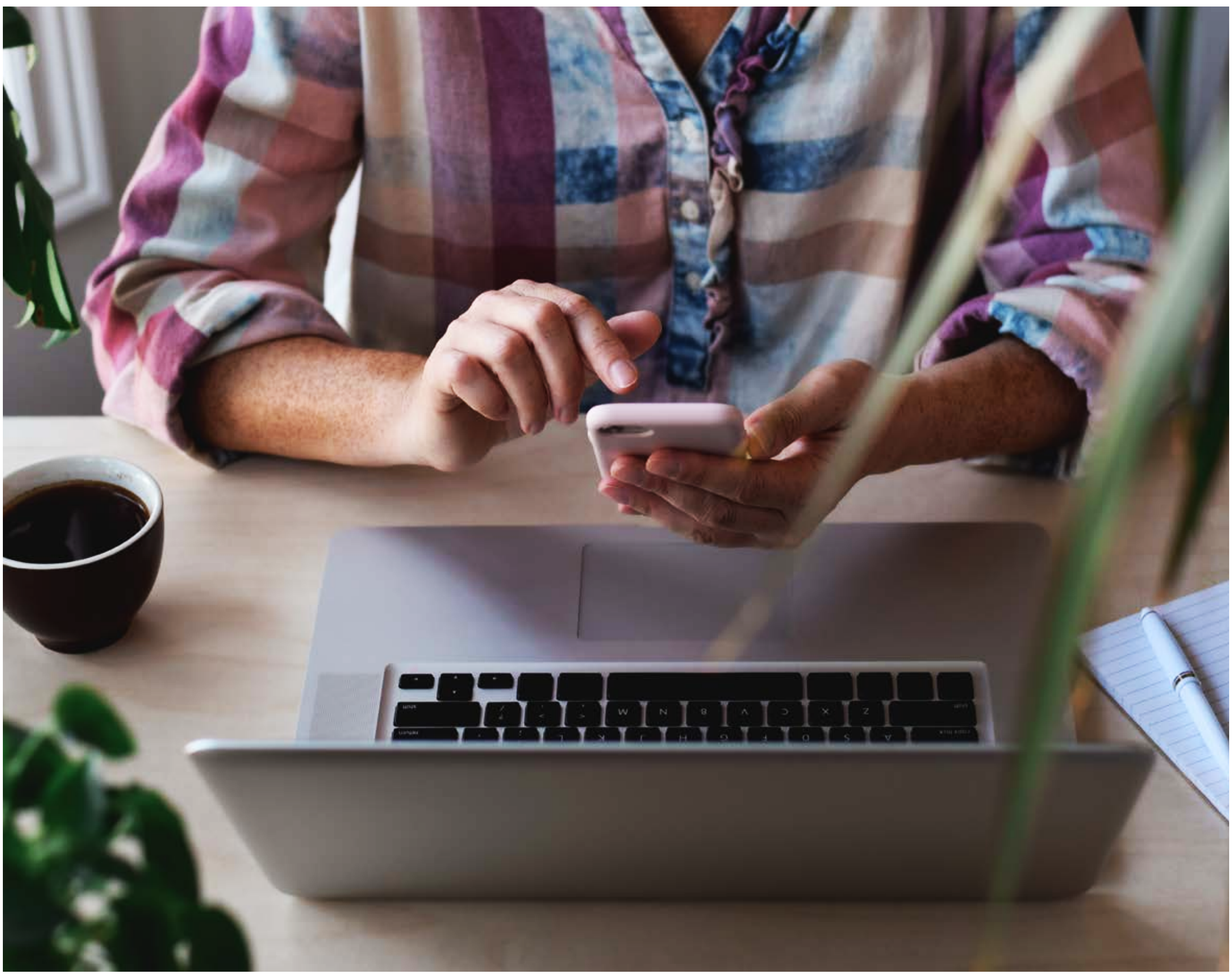
ADVISOR TECHNOLOGY: COLLABORATE

Investor portal.

Change the way you connect with your advisor.



To provide you with a more connected experience, your financial advisor has chosen to work with SEI®.

Our investor portal is designed to connect you with your advisor and your finances in a more meaningful way. We help make it easy for you to see all of your finances in one place, even when you're on the go.

Easy to use.

Our platform is designed with the user in mind, with a clean and simple interface that is intuitive to use. Charts and graphs present financial information in a digestible manner to help you understand what you're looking at.

Ability to collaborate.

Connect with your advisor in real time through direct messaging and file sharing. You'll also have the ability to establish ongoing communication settings tailored to your preferences.

A centralized view.

Track account performance and cash flow, and view your asset allocation anytime from the home screen. Connecting outside accounts can give you a complete financial picture and help you track progress toward your financial goals.

Mobile document scanner.

Scan, upload, and store important files like statements, tax forms, and legal documents directly from your mobile device. Organizing is made easy with the ability to create and label folders. Transparency and timely information are important—that's why both you and your advisor will receive notifications when files are uploaded.

Your relationship with your financial advisor is about more than just managing wealth. It's about giving you the ability to make confident decisions.

Get started.

1 Accept your invite and create a login

Your advisor will email you a link with an invitation to register your online account.

Tip: Bookmark the URL **investor.sei-connect.com** for future access.

2 Download our app

Scan a QR code below to download the mobile app, or simply search "SEI Connect - Investor".

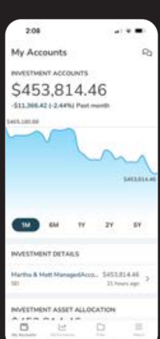
Download on the App Store

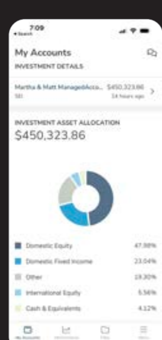
GET IT ON Google Play

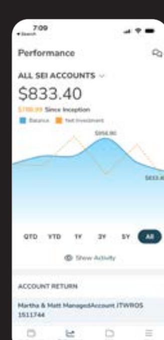
3 Begin exploring

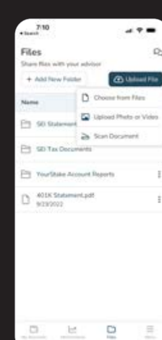
- Upload files using the document scanner
- Add outside accounts
- Track your progress through the various dashboard views
- Send a direct message to your advisor

On-the-go finances









Helping to make information accessible, so you can make confident decisions with your advisor.

Contact your advisor to learn more.

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Important information

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