

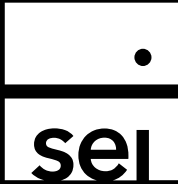
The case for VITAL solutions.



For every investor concern or investment objective, you're likely exploring solutions that help power wealth for your clients.

We believe that the five themes below, which we call VITAL, will be the focus of many client conversations throughout the year. Here are some investment solutions to consider and discuss with clients.

	Volatility	Income	Tax management	Adaptability	Low cost
INVESTOR CONCERNS	Volatility has made investors more risk averse. Consider talking with them about solutions that help manage uncertainty.	Some investors have experienced events that have impacted their income needs, such as caring for aging parents. Explore solutions that help provide sufficient income while maintaining discipline.	It's not about what you earn, but what you keep. Explore a range of tax-managed strategies and solutions designed to optimize after-tax return and demonstrate how tax drag can be managed all year long.	Today, choice is more important than ever. Investors crave personalization and customized solutions that meet their needs, regardless of where they are in the wealth cycle.	Many investors are seeking low-cost solutions, driven by the inundation of choices that exist today. But low cost shouldn't meant sacrificing compelling investment solutions.
WHO IS THE IDEAL CLIENT?	Conservative investors Long-term investors Investors with shorter time horizons who are seeking principal protection over accumulation	Retired—or approaching retirement—investors who are concerned about longevity risk Those leveraging investments to meet living expenses Foundations and nonprofits required to meet spending/gifting goals/requirements	Investors seeking to improve after-tax returns on their investable assets	Investors who prefer curated investment solutions Investors who want access to institutional and boutique investment managers	Fee-sensitive investors Investors who prefer passive investment solutions over active management
POTENTIAL INVESTMENT SOLUTIONS	SEI Stability-Focused Strategies SEI Managed Volatility suite of solutions (funds, SMAs and ETFs ¹) SIMT Multi-Asset Capital Stability Fund SIMT Conservative Income Fund SIMT Tax-Free Conservative Income	Distribution-Focused Strategies (DFS) SIMT Multi-Asset Income Fund STET Tax-Advantaged Income Fund SIMT High Yield Bond Fund SMA Fixed Income solutions (bond ladders, bullets, and barbells) Preferred Securities (SMA) Diversified Income Strategies (SEI High Income and Real Income Strategies)	SEI Tax-Managed Strategies (mutual funds, ETFs and SMAs) SEI Systematic Core Strategies Estimated Taxes-Saved Reporting, which provides summary and detail regarding taxes saved for the investor Managed Account Solutions (SMA & UMA) with tax overlay	Advice and Allocation Group ² SEI Strategies featuring the American Funds [®] Custom High Net Worth Portfolios, managed by City National Rochdale SEI Strategies featuring Dimensional UMA implementation framework to deploy goals-based wealth management.	SEI Systematic Core Strategies SEI ETF Strategies SEI Strategies featuring the American Funds SEI Strategies featuring Dimensional SEI Fixed Income Management SEI Enhanced Factor Strategies (SMA and ETF)



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¹ ETFs and SMAs offered through SEI Mutual Fund Models and Managed Account Solutions

² SFIPM is a team within SEI Investments Management Corporation (SIMC).

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Consider the Strategies' investment objectives, risks, charges and expenses carefully before investing. The Strategies invest in funds to obtain the desired exposure to an asset class. A copy of each fund's prospectus is available upon request. The prospectus includes information concerning each fund's investment objective, strategies and risks.

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The funds in the Strategies are subject to tracking error risk, or the risk that the strategy's performance may vary substantially from the performance of the index it tracks as a result of cash flows, expenses, imperfect correlation between the strategy and the index and other factors. Actively managed ETFs may be subject to increased transaction costs. Active trading may increase the amount of taxes you owe by generating short-term gains, which may be taxed at a higher rate.

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There is no guarantee that the investment objective will be fulfilled. The principal balance of the portfolio may be depleted prior to a portfolio's target end-date and, therefore, distributions may end earlier than expected. This risk increases if the distribution amount chosen is a significant portion of the starting principal. The projected time periods do not take into account the payment of fees to the advisor out of the portfolio or any other distribution from the account.

Consider the SEI Tactical ETF, Strategic ETF and Tax Managed ETF Strategies' investment objectives, risks, charges and expenses carefully before investing. The Strategies invest in exchanged-traded products (ETPs) to obtain the desired exposure to an asset class. A copy of each ETP's prospectus is available upon request. The prospectus includes information concerning each fund's investment objective, strategies and risks. The Strategies' investment performance, because they are a portfolio of funds, depends on the investment performance of the underlying funds in which they invest. The funds in the portfolio 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.

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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.

To determine if the Funds are an appropriate investment for you, carefully consider the investment objectives, risk factors and charges and expenses before investing. This and other information can be found in the Funds' summary and full prospectuses, which may be obtained by calling 1-800-DIAL-SEI. Read it carefully before investing.

- **Not FDIC Insured**
- **No Bank Guarantee**
- **May Lose Value**

As of 3/31/2024.