

TIFIN Wealth.

SEI Strategic Partner



Leverage our relationships to get discounted pricing on valuable services.

As part of our continued commitment to help advisors power wealth and focus on client relationships, we have established strategic partnerships with several key business service partners to help you **reduce costs**, **save time** and **increase efficiencies** to run a more successful firm.

TIFIN Wealth

TIFIN Wealth is a personalized investment proposal generation platform that uses advanced risk alignment as its foundation and can enhance an advisor's client view through simple goal-based planning. TIFIN Wealth aggregates data from multiple assessments to build a broad view into a prospect or client's wants, fears, values, and appetite for risk. Then, advisors can generate personalized proposals.

Contact

hello@tiffinwealth.com

Discount

FREE to clients with under \$100M in AUM custodied with SEI
20% off if above \$100M AUM threshold

Website

<https://campaign.tiffinwealth.com/sei-1>

Important information

In February 2024, SEI Investments Company (SEI) announced a strategic investment in TIFIN. SEI does not endorse the use of any of the products mentioned herein. Always check with your firm's compliance department before implementing any new third party vendors.