

Institutional Snapshot

# YOUR SUCCESS IS OUR SUCCESS

SEI New ways.  
New answers.®

## AS AN EXPERIENCED OCIO, WE'VE FOCUSED ON HELPING NONPROFITS SUCCEED FOR MORE THAN 25 YEARS.

1992

We took in our first nonprofit clients



TODAY

We manage **\$32.2B** in assets for more than **170** nonprofit clients

## OUR STRENGTH IS ON YOUR SIDE.

### GLOBAL FIRM

with U.S. headquarters in Oaks, PA

### \$97.2 BILLION

in institutional assets under management

### 170+ NONPROFIT CLIENTS WORLDWIDE

with 49% partnering with us for more than 10 years

### \$10 MILLION ANNUAL INVESTMENTS

in research tools and technology for investment and risk management

### SIGNIFICANT INFRASTRUCTURE

and resources with a dedicated group focused on understanding the needs of universities

Publicly held NASDAQ:  
**SEIC**

SEI has approximately:

**100+ INVESTMENT EXPERTS**  
**300+ SEASONED PROFESSIONALS**

Supporting the institutional business

## Our OCIO solution is customized to your organization's unique needs

- › Community foundations
- › Private foundations
- › Educational institutions
- › Faith-based organizations
- › Arts and sciences
- › Museums and aquariums

## We are active in the nonprofit industry

- › Continued research and peer analysis through SEI-sponsored Nonprofit Management Research Panel
- › Host SEI Nonprofit Symposium for nonprofit client education and sharing best practices

## OUR TEAM VALUES MORE THAN INVESTMENT MANAGEMENT.



**SEI Cares**



**SEI Green Team**



**SEI Women's Network**

Celebrating 10 Years



**SEI Wellness Team**



**SEI Diversity**

Tomorrow's Workforce Today



**SEI Salutes**

## WE'VE EVEN BEEN RECOGNIZED FOR OUR SUCCESS—AND OUR CLIENTS' SUCCESS.



Top OCIO Provider at the Fund Intelligence 2017 and Fund Map 2018 Institutional Asset Management Awards as of November 2018.

\*Pensions & Investments, July, 2020. SEI ranked as a largest outsourcer based on worldwide institutional outsourced assets under management.

**FIND OUT WHAT WE CAN OFFER  
YOUR ORGANIZATION.**

**610-676-7926**  
**institutions@seic.com**

© 2021 210184.07 IG (04/21)

**SEI** New ways.  
New answers.®