SEI and Redtail Integration

Integrating your CRM with SEI provides you with a more seamless work experience

SEI New ways. New answers.®

REDTAIL TECHNOLOGY

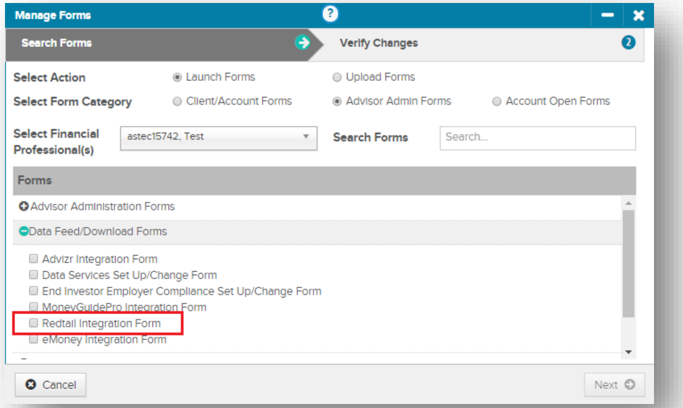
SEI and Redtail have collaborated to bring you a seamless integration experience. Now, through the integration you are able to:

- ✓ [View SEI data in Redtail]
- ✓ [Single Sign-On (SSO) between Redtail and SEI Advisor Center]
- ✓ [Manage client contact information directly from Redtail]
- ✓ [Launch transactions from Redtail to SEI Advisor Center]

Find out about all of these time saving features

Getting Started

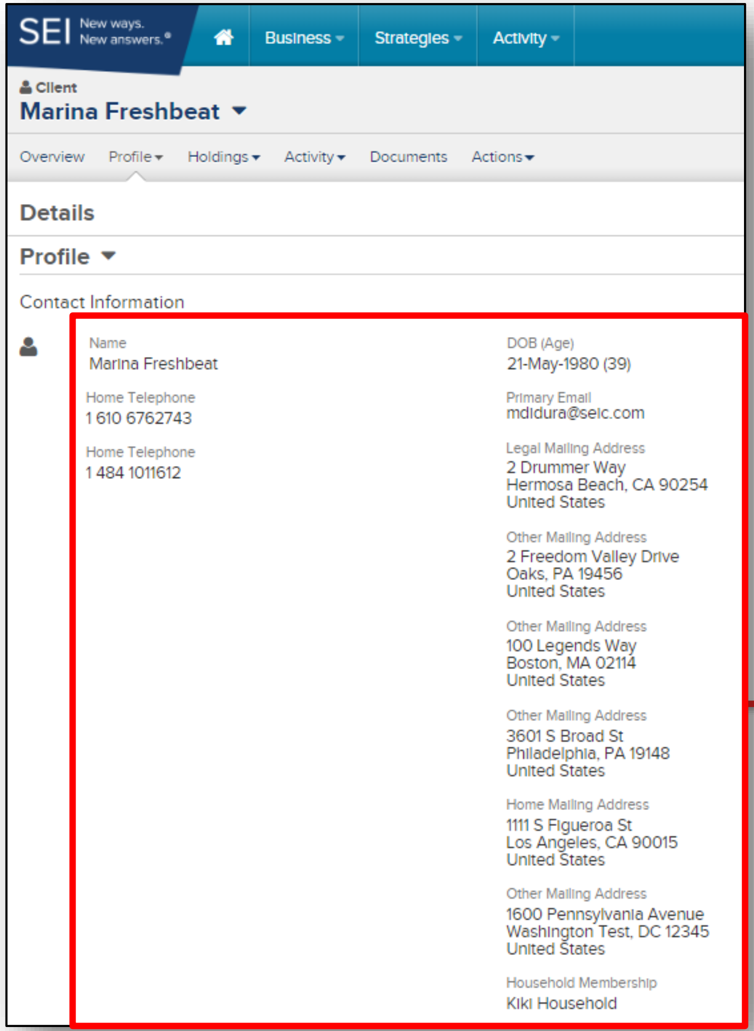
✓ To sign up for the SEI and Redtail Integration, complete the Redtail Integration Form in the Forms menu on SEI Advisor Center in the Advisor Admin portion, in the Data Feed/ Download Forms section.

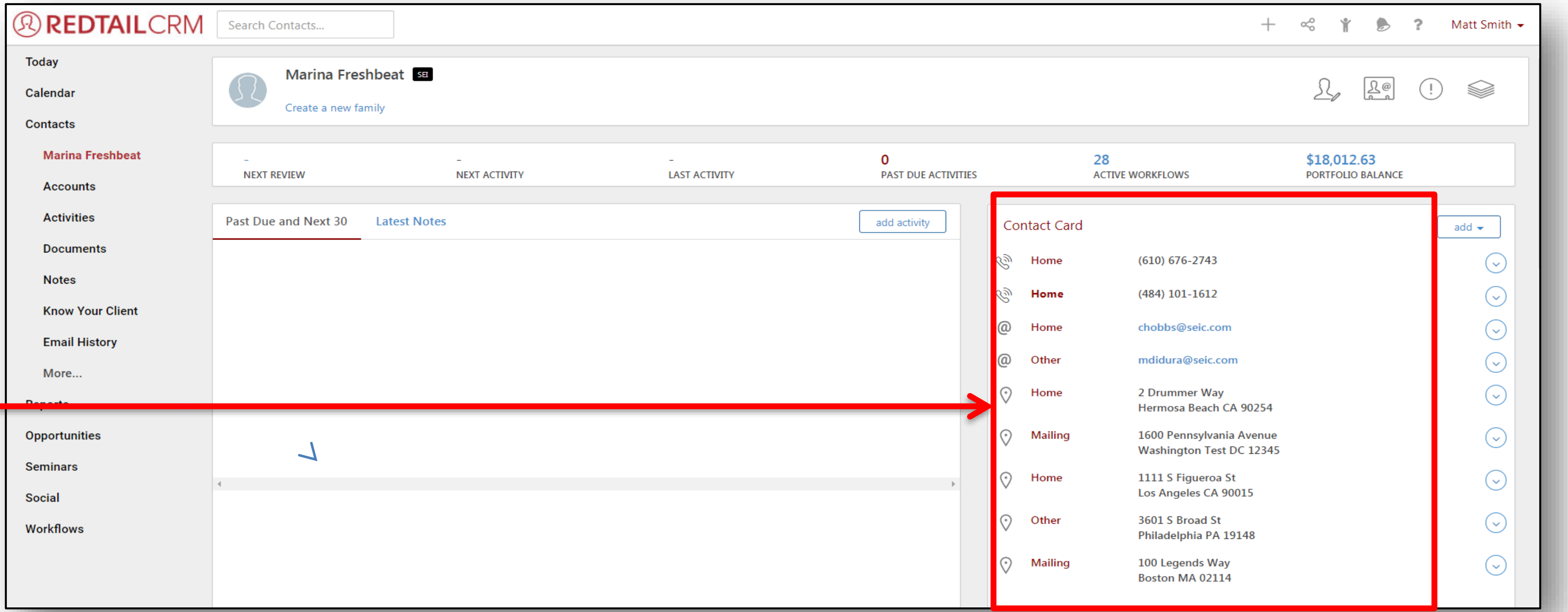


✓ Once the integration is set, follow these simple instructions to complete the integration:

Data Integration

SEI provides client contact and account information that is automatically updated in Redtail, allowing you to have a clear summary of your client's information in a one location.





Data Integration

- ✓ SEI has the ability to suppress account data when integrating with Redtail. If you're receiving SEI account data from another source such as Albridge, Black Diamond or eMoney, SEI doesn't have to send account data to Redtail. We do not presently have the ability to suppress client contact data.

- ✓ When SEI initially delivers data to Redtail, there is the potential for an influx of SEI contact information in Redtail. In most cases, the SEI data integration will simply coexist with already created contact information; however, there are instances in which SEI addresses similar to existing addresses in Redtail will populate for a contact. SEI and Redtail have created methods to manage address and phone number information. This will be covered in a separate video.

- ✓ There are also instances in which data from SEI will not sync with an existing contact creating two contact records in Redtail for the same client. Redtail will attempt to match a SEI client to an existing Redtail contact by matching the client's tax identification number and name. Please see the Redtail CRM Integrations Guide on how to merge contacts.

Single Sign-On

The convenient Single Sign-On functions allow you to move between the homepages of Redtail and SEI Advisor Center, or between a Redtail client record and SEI client profile, all without a separate sign-on process or having to reenter your password.

Click this video to learn more

SEI Client Management Information

You no longer have to update your client's contact information on multiple sites. You can update your client's address and phone number information in Redtail and it will automatically update in SEI.

Click this video to learn more

Transaction Integration

You can launch some transactions from Redtail directly into SEI without having to complete a form.

Launch the following forms:

- ✓ Cash Disbursement
- ✓ Cash Receipt
- ✓ Trade
- ✓ Tax Loss Harvest
- ✓ Strategy Assignment
- ✓ Process Fee Assignment
- ✓ Launch Account Application
- ✓ Launch Electronic Forms

Click here to learn more

Please see the SEI and Redtail integration features for additional instructions:

For any questions or more information please feel free to contact The Integration Specialist Team at integration@seic.com. To schedule time to talk click here.

IMPORTANT INFORMATION

Information presented by Independent Advisor Solutions by SEI, a strategic business unit of SEI Investments Company (SEI). Services provided by SEI Investments Management Corporation, a wholly owned subsidiary of SEI.

Redtail is not affiliated with SEI or its subsidiaries.

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