



# Frequently Asked Questions

This document was created to answer all questions that were asked during our SEI Advisor Center Webinar which took place May 11th.

Q) Does SEI have a connection with Wealthbox?

A) Yes we do integrate with Wealthbox, you are able to find more information if you navigate to the Knowledge center > Advisor Business Platform > Integrations.

Q) Will SEI ever allow firm level DocuSign for Distribution forms and not only accept wet signature or SEI's DocuSign?

A) Not in the near future due to a Compliance regulation.

Q) I've run into issues uploading new account application due to the file being too large. So, I go into manage forms and upload new acct there. Will this be updated?

A) There is currently a 10MB/file limit, 10 files per upload. We are looking into increasing to 20MB, no ETA at this time.

Q) How are preassigned account numbers beneficial?

A) Preassigned account numbers can be helpful when you are initiating multiple transfers at the same time to be able to track money coming in.

Q) Are we any closer to an easier path for 3rd party access aside from a signed physical form?

A) This is not currently on the roadmap.

Q) How do I submit a request for client login to SEI website?

A) You are able to invite a client through the SEI Connect advisor portal in the top left under Quick Actions > Invite.

Q) What's the best way to learn about an online action and how to use it?

A) Each action has an Action Help option that includes the guide, a video, a guided tour, and important information.

Q) Where can I see sample benchmark packages for Broad, Default, Morningstar, Lipper and Russell I can determine the most appropriate benchmark package?

A) This is available under the Platform tab>Customization>Report Benchmarks. This is a repository of available benchmarks, but you can also make their own. If you find one that you are interested in, you can drill down and view the quarterly or monthly performance.

Q) Does SEI have plans to allow us to resend an e-sign request for distributions as we can for new account paperwork?

A) There is no plan for this currently. Great feedback though!

Q) Can we link an individually owned bank account to a trust-owned SEI account and vice versa?

A) If the tax id is the same on both the bank account and the SEI account you can link them with standing instructions.

Q) If uploading a Standing Instructions Form, how do I track it to see when it is posted or why it wasn't posted?

A) When standing instructions are set up you are able to go to Account Level then Preferences and related parties. You will see Straight Through Eligible under the banking or address on the right.

Q) Is there any way to block or stop the popup windows upon login? It would be nice to look at these after I do the work I came in for.

A) Unfortunately there is not at this time.

Q) Do you think that we will ever get more access to SEI docuSign? As a co-advised firm we have extremely limited access.

A) This is only able to be decided by your broker dealer on what you are able to use.

Q) When will the new ""initiate trade"" tool get launched?

A) The Initiate trade action is fully live for all accept co advised firms.

Q) Can you create custom report templates? Additionally, can you automate report creation? I.E. Automate batch performance reports for clients and automatically placed it in clients portal. Thx!

A) You have access to multiple reports from the reports quadrant in your home page of the SEI Advisor Center. If you are looking for any other reports you will want to speak to your service liaison for further assistance.