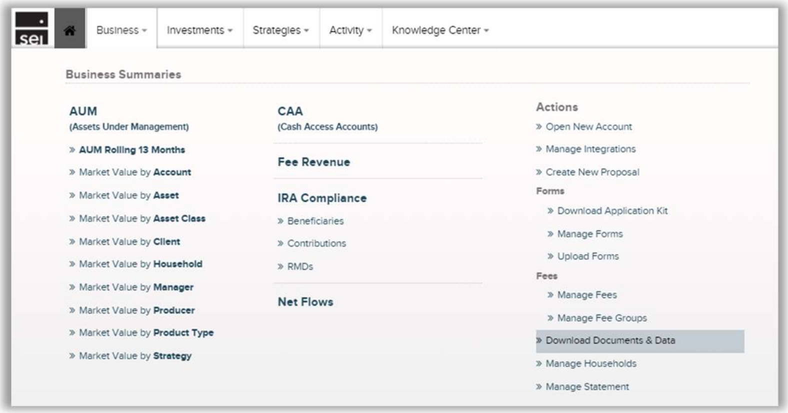
Bulk Statement Download.

Use of Feature

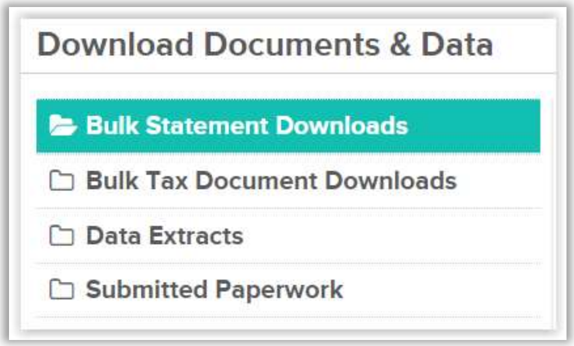
You will automatically receive a concise "bundled" collection of all of your client statements, commonly referred to as the **Bulk Statement Download**. These statements will be available for a rotating 3 months. We do suggest that your firm have a procedure to download this file and retain with your firm's permanent records. You will receive an email when your **Bulk Statement Download** is available via [seiadvisorcenter.com.](seiadvisorcenter.com)

Steps to download Bulk Statement Downloads from SEI Advisor Center:

Step 1: From the **Business** drop down, navigate to the **Download Documents & Data** page.



Step 2: On the left side of the screen, select **Bulk Statement Downloads**.

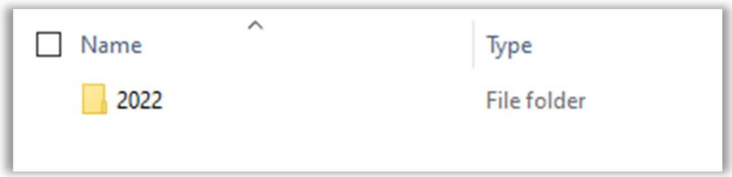


Step 3: Select the **Document Icon** next to the file that you wish to download. Each link will hold up to 2,500 PDFs. Filters & Options are available to search across different Date Ranges and Statuses. Once a file has been downloaded, the status will change from Available to Downloaded.

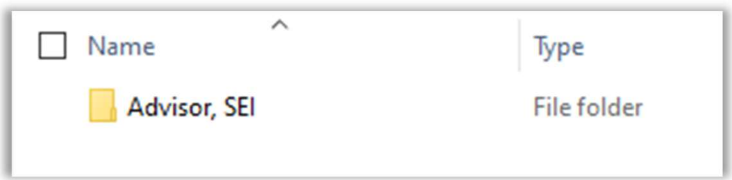
Step 4: Select the **Open** button on the file dialog box that appears. This download box may differ based on the settings and browser you are using. If the download box does not appear, make sure to check your pop up blocker.

Step 5: Double click on the **SEI Stmnts** folder.

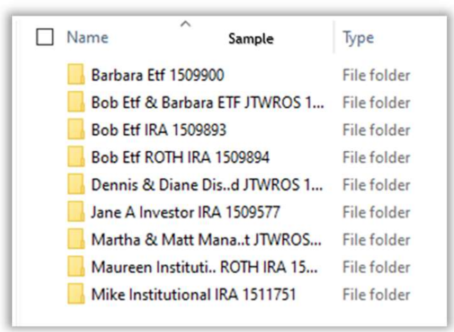
Step 6: Double click on the **Year** folder.



Step 7: Double click on the **Advisor** folder.



Step 8: The folder will list the accounts assigned to the Advisor. Double click on the account folder you would like to view.



Step 9: The PDF naming convention is **Account or Group Name / Date / Frequency**.