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 <u>seiadvisorcenter.com</u>.

Steps to download Bulk Statement Downloads from SEI Advisor Center:

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

*	Business +	Investments +	Strategies *	Activity *	Knowledge Center +	
Bus	iness Summ	aries				
AU (Ass	AUM (Assets Under Management)		CAA (Cash Acc	ess Accounts)		Actions » Open New Account
» Al ≫ M	» AUM Rolling 13 Months » Market Value by Account		Fee Re	venue		» Manage Integrations » Create New Proposal
» M	» Market Value by Asset		IRA Co	IRA Compliance		Forms » Download Application Kit
» M	Market Value by Asset Class Market Value by Client Market Value by Household Market Value by Manager		» Benefic » Contrib	outions		» Manage Forms » Upload Forms
≫ M ≫ M			» RMDs			Fees » Manage Fees
≫ M ≫ M	arket Value by I arket Value by I	Producer Product Type	Net Plo	ws		» Manage Fee Groups » Download Documents & Data
» Market Value by Strategy					» Manage Households	
						» Manage Statement

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

🝃 Bulk State	ment Downloads
🗀 Bulk Tax D	Ocument Downloads
🗀 Data Extra	octs
Submitted	Paperwork

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.

Filters & Options					
Date Range All		~			▼ Apply Filter
Status All		~			<u>Clear</u>
Created 🗸	As Of 🗸		Name 🗸	Status 🗸	*
08-Jul-2022	30-Jun-2022	Sample Advisor Name_2022_1.zip		Available	

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.	Name ^	Type File folder	
Step 6: Double click on the Year folder.	Name ^	Type File folder	
Step 7: Double click on the Advisor folder.	Name Advisor, SEI	Type File 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.

