The Knowledge Center

Frequently Asked Questions

This document was created to answer all questions that were asked during our Knowledge Center Webinar which took place March 9th.

Q) Where is marketing material found?

A) This can be found under Advisor Services > Marketing for Your Clients.

Q) Client friendly pieces and normal language not legal ease working?

A) There are a lot of client friendly marketing pieces under the sub tabs of Advisor Services. We also added two new pages under Advisor Services: Client Profiling Tools and Vital Series

Q) Where can we find RTQ and/or Client Profile Kit as well as older generic marketing materials?

A) This can be found under Advisor Services > Client Profiling Tools

Q) Where can we find client presentations, such as past: Taking the fear out of market volatility?

A) This is currently not displayed in Knowledge Center. Under Advisor Services > VITAL Series, there is a video and PDF available that covers the theme Volatility.

Q) Where can I get info on the new SEI Connect platform?

A) A service liaison would be able to assist you in directing you to Connect from the SEI Advisor Center.

Q) Where can I find information on the Trust Services?

A) This can be found under Asset Management > Wealth Services > Personal Trust Services.

Q) Where can I find a file that walks me though exactly how to navigate this, like a user's manual?

A) To learn more about the Knowledge center you will want to be sure to utilize the guided help at the top of the page.

Q) Is the new Yield information just for SEI strategies or also for Custom strategies?

A) Currently, the Yield information displayed in Knowledge Center is for Mutual Funds, ETFs and Money Markets. We are looking to expand this beyond the current offering.

Q) Do you know where I can find client approved brochures regarding SEI tax managed accounts?

A) There are various brochures under Advisor Services > Advisor Tax Resources

Q) Are you building out the marketing material similar to what was in Business Builder

A) There are client friendly marketing pieces under Advisor Services > Marketing for Your Clients