



Integration Service Summary

What are integration services?

Integration is the way in which SEI connects our platform with other front office technology used within your firm. Some examples of front office technology are:

- › Aggregation (e.g. Yodlee)
- › CRMs (e.g. Redtail or Wealthbox)
- › Financial planning tools (e.g. MoneyGuide or eMoney)
- › Client reporting tools (e.g. Albridge)
- › Employee compliance reporting (e.g. Star Compliance)

There are varying levels of integration services available between SEI's platform and these front office technologies. Here are some definitions of the different types of integration services that exist:

1. **Data Integration** - The ability to receive an automatic, daily feed of your SEI accounts, holdings and transactions in your front office technology.
2. **Single Sign-on (SSO)** - The ability to navigate between SEI's platform and your front office technology at the click of a button without having to enter or remember your username and password.
3. **Transaction (Deep) Integration** - The ability to initiate transactions for your SEI accounts in just a few clicks within your front office technology. Here are the types of transactions you can initiate:
 - › Contact Information Management - Update an address, phone number or email from Redtail and have that update flow to SEI
 - › Cash Disbursement - Launch a cash disbursement from the Redtail without having to log into SEI Advisor Center
 - › Cash Receipt - Launch a cash receipt from the Redtail without having to log into SEI Advisor Center
 - › Strategy Assignment - Launch a strategy assignment change from the Redtail without having to log into the advisor desktop site
 - › Fee Assignment - Launch a fee assignment change from the Redtail without having to log into the advisor desktop site
 - › Trades - Launch a trade from the Redtail without having to log into SEI Advisor Center

- › Tax Loss Harvest- Launch tax loss harvesting from the Redtail without having to log into SEI Advisor Center
- › New Account Opening- Open a new account from the Redtail without having to log into SEI Advisor Center

What are the front office tools with which SEI integrates?

Please visit [our technology integrations](#) webpage for information regarding our existing integrations.

How do I set up the SEI integration?

From the Business menu Actions, select Manage Forms. Select the Launch Forms and then Advisor Admin Forms radio buttons. Expand the Data Feed/Download Forms section to locate the form to set up integration.

The screenshot shows the 'Manage Forms' application window. At the top, there are two tabs: 'Search Forms' (active) and 'Verify Changes'. Below the tabs, there are several sections:

- Select Action:** Radio buttons for 'Launch Forms' (selected), 'Upload Forms', 'Client/Account Forms', 'Advisor Admin Forms' (selected), and 'Account Open Forms'.
- Select Form Category:** Radio buttons for 'Client/Account Forms', 'Advisor Admin Forms' (selected), and 'Account Open Forms'.
- Select Financial Professional(s):** A dropdown menu showing 'Advisor, SEI'.
- Search Forms:** A text input field with the placeholder 'Search...'.

Below these sections is a table with a 'Forms' header and a 'View Forms' button. The table is expanded to show the 'Data Feed/Download Forms' section, which contains a list of forms with checkboxes and document icons:

Forms	View Forms
<input type="checkbox"/> Data Services Set Up/Change Form	
<input type="checkbox"/> End Investor Employer Compliance Set Up/Change Form	
<input type="checkbox"/> Junxure Integration Form	
<input type="checkbox"/> MoneyGuidePro Integration Form	
<input type="checkbox"/> Redtail Integration Form	

At the bottom of the window, there are 'Cancel' and 'Next' buttons.

To set the integration with Redtail, select the form named Redtail Integration Form.

To set the integration with Wealthbox select the form named Wealthbox Integration Form.

To set the integration with Junxure (AdvisorEngine), select the form named Junxure Integration Form.

To set the integration with MoneyGuidePro, select the form named MoneyGuidePro Integration Form.

To set the integration with eMoney, select the form named eMoney Integration Form.

For all other integration set ups (i.e. Albridge, Orion, Investigo) please select the form named Financial Professional Data Services Set Up/Change Form.

If your client requires SEI to send account data to their employer, please complete the form named End Investor Employer Compliance Set Up/Change Form.

Once I submit the form what are the next steps?

Once you submit a form please allow 3 business days for data to begin to populate within your financial tool. Timelines may also vary based on the vendor process. A Middle Office representative will contact you once the integration is set.

Who do I contact if I have questions?

If you have questions about the integration service, please contact the Integrations Team at integration@seic.com or contact a member of your Service Team at 1-800-734-1003.

Don't see your preferred technology tool listed? Let us know! We're always exploring new integration opportunities. Drop us a line at techtolrequests@seic.com and tell us about the tool you'd like to see integrated.