

Investor Portal Webinar

Frequently Asked Questions.



Q) Is the new Investor Portal replacing the legacy investor portal Access My Portfolio?

A) Yes - We plan to retire Access My Portfolio by the end of next year in 2024.

Q) Where can I find a list of my clients currently using Access My Portfolio?

A) From SEI Advisor Center select the links icon and Access My Portfolio from the drop down. Once Access My Portfolio loads select the blue Export All button. This will download an excel sheet with your clients with access and their last log-in date.

Q) Is this portal live now and how can I access it?

A) Yes - You can access the new investor portal by navigating to links on SEI Advisor Center, select Investor Portal Admin from the drop down.

Q) Will the webinar & short videos be available for replay?

A) Yes - Log into SEI Advisor Center and select the question mark icon to access our help menu. Select the Resources tab and What's Trending Educational Series - Investor Portal.

Q) Where can I find a tutorial of the Investor Portal?

A) On the home page of the Investor Portal select the question mark icon to access our digital walk throughs. You may also access the Investor Portal Advisor Quick Guide from Knowledge Center. Select Knowledge Center from SEI Advisor Center, under Advisor Business Platform select Investor Experience.

Q) Do we need to do anything to migrate clients from Access My Portfolio to the new Investor Portal?

A) Yes - Invite your clients to the new investor portal one by one, automatically after account open, or in bulk.

Q) How do we add our firm's logo and are there any image requirements?

A) Select the Admin page from the left pane of the investor portal. Select the camera icon under Logo. Best practice is to upload a JPEG & PNG under 50mb in size.

Q) What should I do if I don't see or have access to the Admin page?

A) Anyone with access to your full firm will automatically have access to the Admin page. If you wish to gain access, you can submit the SEI Wealth Platform User Registration/Change Form under the help menu or reach out to the SEI service team or your sales contact to discuss updating your role/user access.

Q) Can I invite or set myself up as a contact so I can send an invitation and register to become familiar with what my clients will see?

A) Yes - If you have an SEI account, search for your contact record and send yourself an invite. If you do not have an SEI account, add yourself as a new contact and then invite yourself.

Q) How do I hide the performance page, can I remove benchmarks?

A) Select the Admin page from the left pane of the Investor Portal. Under the Firm Configuration section toggle your selections, display performance and benchmarks to investors.

Q) Do I have access to the chat feature and how are conversations tracked?

A) Chat is currently only available to RIA firms. Conversation history can be exported to an Excel file by running a compliance report in the firm vault.

Q) On the Advisor view of the Investor Portal home screen, what does Quick Actions display?

A) Currently we display client birthdays and a bulk invite option.

Q) Does my investor need an SEI account open in order for me to be able to invite them to the portal?

A) No - You can invite prospects and non SEI clients to have access to the investor portal. **Q) Does a prospect have full functionality, for example will they be able to access the vault?**

A) Yes - SEI does not limit prospect functionality. Encourage your prospects to add outside accounts and use the document vault to collect necessary information for onboarding.

Q) Can I remove prospect access if they do not become a client?

A) Yes - Select the trash can icon next to their name on the Contacts page.

Q) Will former client be removed from my view?

A) Yes - We are planning to hide/remove these clients in a future release.

Q) How can I show my SEI client what their experience would be like if they registered for access?

A) Select the client from the Contacts page and select the "Open Investor View" action.

Q) Is the last 4 digits of the investors social security number required in order to get access?

A) No - We only need the investor's first and last name, email, and phone number added to be able to receive an invite.

Q) Will client contact information automatically import from RedTail to the Investor Portal?

A) At this time, the investor portal does not integrate with Redtail. However, we are currently working towards this integration to allow you to view your Redtail prospects in the investor portal as you do today within the Proposal Builder and Account Open.

Q) Does the portal have financial planning capabilities?

A) No, the investor portal does not have financial planning capabilities, but we do plan to integrate with popular financial planning tools in the future.

Q) Are there any screens or features related to estate planning?

A) Not at this time.

Q) Can an advisor/firm link other custodians such as NFS or Allianz?

A) No, the outside accounts can only be added by the investor.

Q) Does this replace Albridge?

A) Reach out to your sales representative to get more information about a tech stack review.

Q) What is the web address/URL where my investor can login?

A) investor.sei-connect.com

Q) Is there a mobile app my investor can download?

A) Yes - Share our investor brochure with QR codes or simply have your investor search "SEI Connect - Investor." You may access the brochure from Knowledge Center. Select Knowledge Center from SEI Advisor Center, under Advisor Business Platform select Investor Experience.

Q) What information will my investor see on the cash flow page?

A) The cash flow page displays a summary of income and expenses and transaction details happening in the investors checking/savings and credit accounts.

Q) How do investors link outside accounts and do they update in real time?

A) Investors can link held away accounts by selecting the + Add Account action with the investor portal. Accounts update during login to provide up-to-date information. An investor can also refresh their accounts under the Manage Accounts action to get up to date values.

Q) Will the advisor and firm be able to see the held away accounts my investor's link?

A) Yes - Navigate to your investors contact record and look in the Accounts section on the Accounts tab. The Last Updated column will display the date the account values last updated. You can also emulate your client's view by selecting the "Open Investor View" action.

Q) Are the investor's outside accounts included on their SEI statement?

A) No, only SEI accounts are included on the statements.

Q) Can a firm remove the ability for our investors to add outside accounts?

A) Yes - SEI can turn off the aggregation feature. Contact your

Q) Where can my investor opt into electronic delivery within the Investor Portal?

A) SEI will prompt the investor to make their selections during their first login. Investors can manage their preferences from their Profile at any time.

Q) Can the advisor change the investor's electronic delivery preferences?

A) Yes - If the investor has opted into electronic delivery of statements or tax forms the advisor can switch the investor back to print.

The investor can opt into electronic delivery during their first login into the Investor Portal or they can manage their preferences from their profile.

Q) How long are documents uploaded to the vault retained?

A) We do not have a limit to how long you can keep a document in the vault.

Q) How does an investor get access to their spouse's accounts?

A) From the Manage Forms action launch the SEI Connect Interested Third Party form. This form is available for electronic signature.

Q) Is the Investor Portal approved by my broker dealer?

A) Yes, all Broker Dealers allow the investor portal. However, some capabilities such as aggregation, document vault, and messaging may be disabled depending on your broker dealer.