

Manage Households.

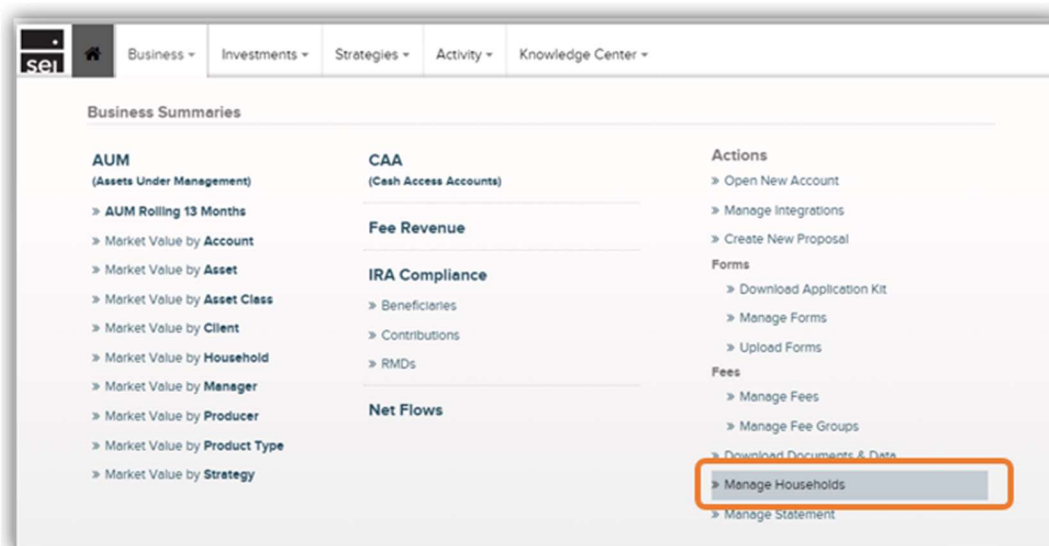


Use of Feature

The **Manage Households** action is a way for users to **Change**, **Create**, or **Delete** households within SEI Advisor Center and is for viewing purposes only. The Households created will not create or impact fee groups, consolidated statement groups, transactions, or the investor website.

Navigating to Manage Households

From the **Business Summaries** page, you can access the **Manage Households** action. You can also access the **Manage Households** action from the **Actions** dropdown within a **Client** snapshot and an existing Household snapshot by searching for a client or household using the Client and Account Search bar along the top of the screen.



If accessing the **Manage Households** action from the **Business Summaries** page, all of your existing households will be listed in the table, and the **Select Workflow** default will be **Create Household**.

If accessing the **Manage Households** action from a **Household** snapshot, all of your existing households will be listed in the table, with the household you are currently in pre-selected and listed at the top. **Select Workflow** will also default to **Change Household**.

If accessing the **Manage Households** action from a **Client** snapshot and the client is currently part of a household, all of your existing households will be listed in the table with the household the client is a member of pre-selected and listed at the top. The **Select Workflow** default will be

Change Household when a client is already part of an existing household. If a client is not currently in a household, all the households will be listed, but the **Select Workflow** default will be **Create Household**.

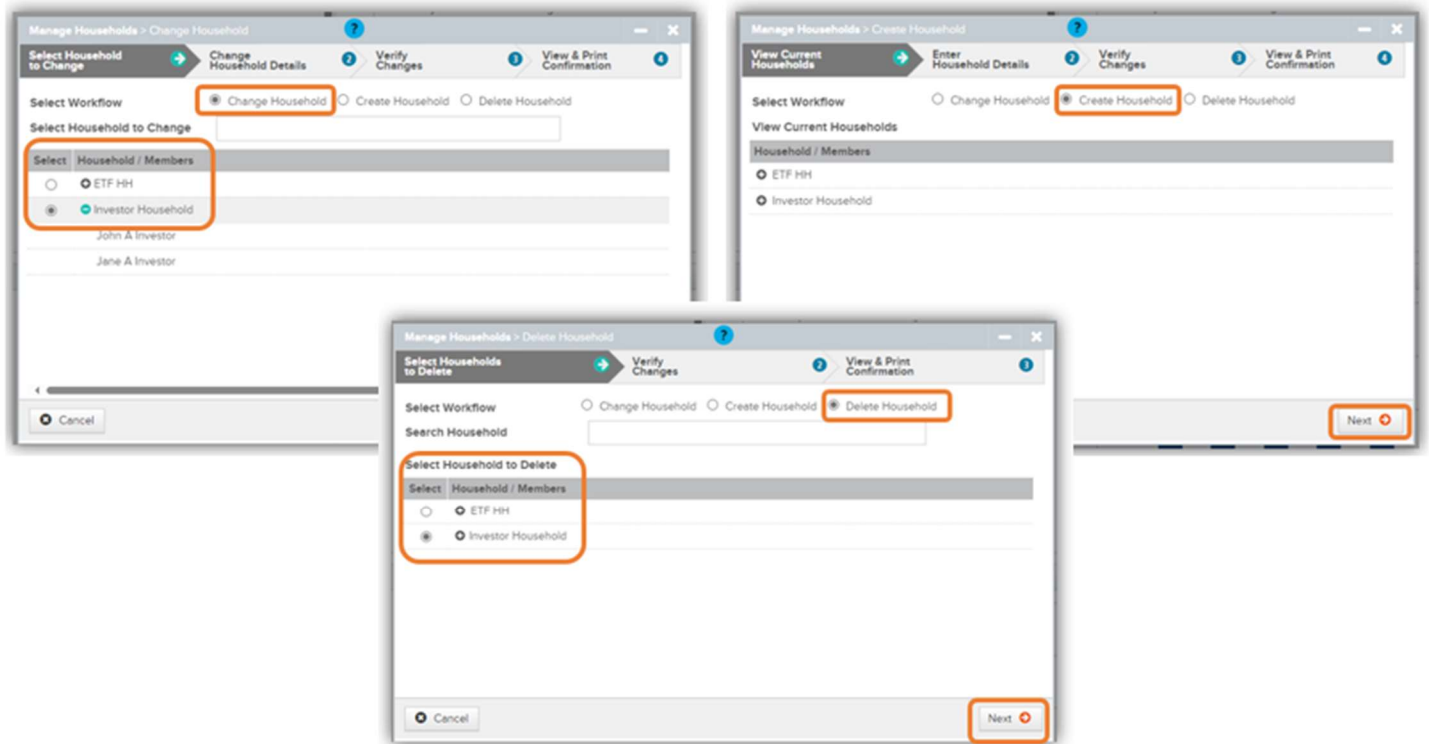
Select Change, Create, or Delete Household

Select Workflow - Select which workflow you would like to complete. The options are **Change Household**, **Create Household**, or **Delete Household**. Please note, you will not be able to add a client to multiple households, a client can only be a member of one household at a time.

When selecting **Create Household**, no other options need to be selected. Simply select **Next** and enter the household details. When entering the household details for **Create Household**, the first member selected will be marked as the primary member.

When selecting the **Change** or **Delete Household** option, you must select which household to edit. You may search for a client from the **Select Household** field or select a household from the list provided. The plus sign next to the household name will expand the household and display all members. If you select **Delete Household**, the radio buttons will change to check boxes and you can delete multiple members from the household by selecting the check box and selecting **Next**.

Next - Selecting the **Next** button will advance you to the **Enter Household Details** screen.



Enter Household Details

From the **Enter Household Details** screen, add the following information:

Household Name & Type - The **Household Name** will be the name that appears in the client and account search. The **Household Type** allows you to distinguish the type of household you are creating. The options are *Family, Corporation, Trust, Partnership, or Foundation*.

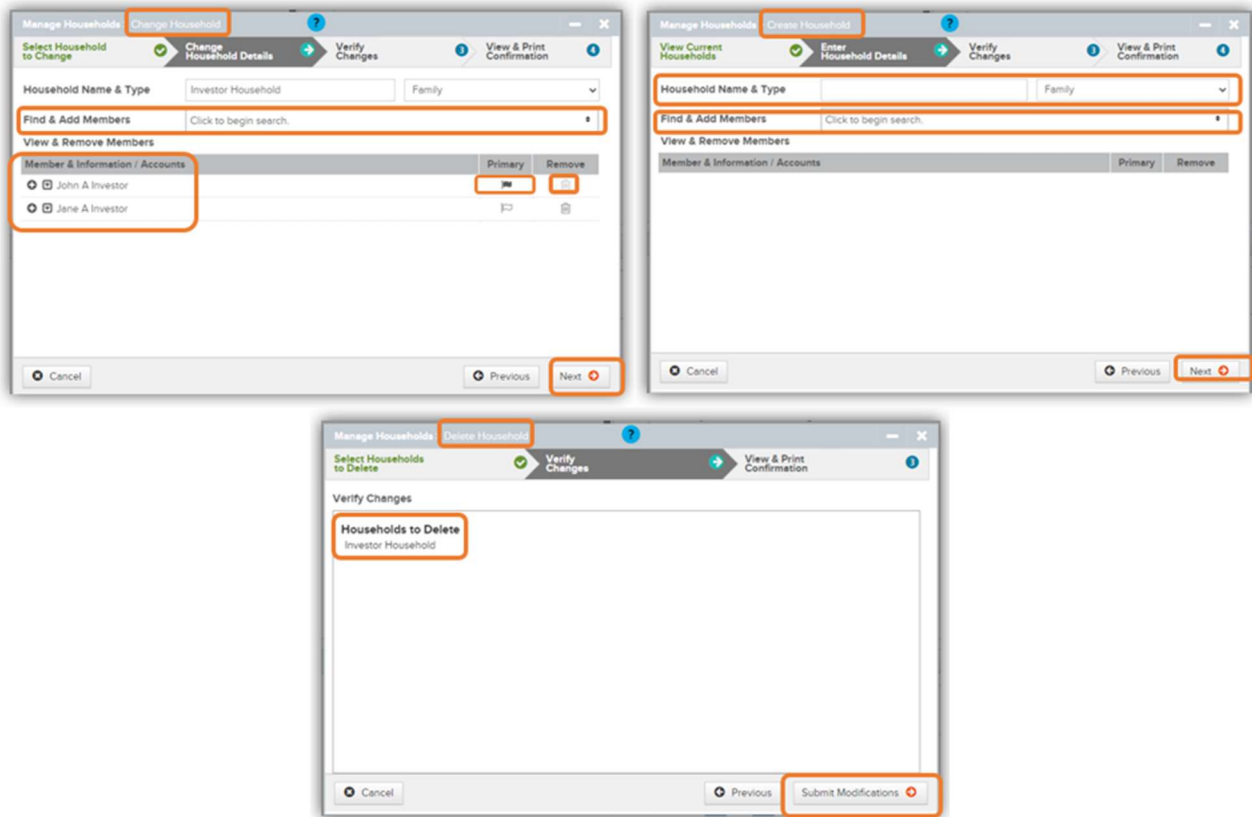
Find & Add Members - When using the **Find & Add Members** search field, results will auto populate as you type. Clients that are currently part of a household will be viewable, but not selectable.

View & Remove Members - If you select the Arrow icon, referred to as the **Drawer** icon, additional details about that client will be provided. By doing this, you are able to identify users that may have similar names. By selecting the **Plus** icon, you will be able to view the accounts associated with that client and thus associated with the household.

Primary Flag and Trashcan Icons - The **Primary Flag** indicates the primary contact of the household. You cannot delete the primary contact. The **Trashcan** icon will be visible but not selectable. You are able to switch the primary contact by selecting the flag next to a member's name. An individual that is not marked with the **Primary Flag** can then be deleted by selecting the **Trashcan** icon.

Next - Selecting the Next button will advance you to the Verify Changes screen.

Please note, if you are **deleting** a Household, the **Household Details** screen will be skipped and you will be taken directly to the **Verify Changes** Screen.

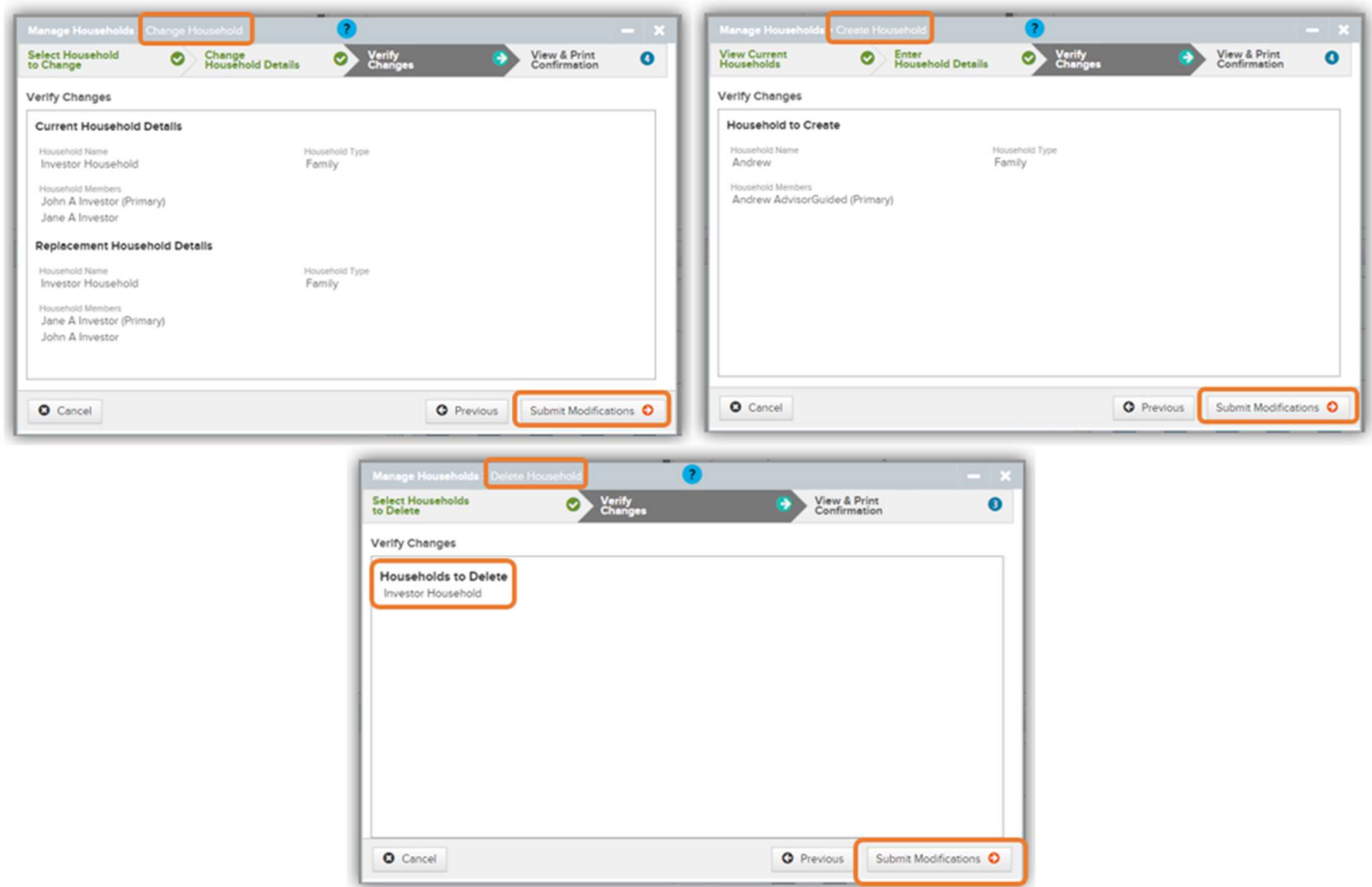


Verify Changes

The **Verify Changes** screen will show the **Household to Create**, **Household to Change**, or **Household to Delete** details. This screen is where you can confirm your details.

Previous - Simply select the **Previous** button to go back and make changes if needed.

Submit Modifications - Selecting the Submit Modifications button will advance you to the **View & Print Confirmation** screen.



View & Print Confirmation

Print Confirmation - The final screen will provide a confirmation page which can be printed for your records. Activity IDs are not generated for **Managing Households**. Once you submit, you have the ability to **Change**, **Create**, or **Delete Another** household and will be taken back to the beginning screen.