# SEI Wealth Platform Envestnet MoneyGuide Integration Set-Up and Overview.

## Summary

| Type | Description |
|---|---|
| Set-Up Procedure | Follow these onetime steps to complete the integration between Envestnet MoneyGuide and SEI |
| Single Sign-On (SSO) Integration | Ability to navigate between SEI and MoneyGuide without having to log back in to either system |
| Client and Household Syncing | Real time holdings sync from SEI to Envestnet MoneyGuide |
| SEI Capital Market Assumptions and Model Data* | SEI Capital Market assumptions and models used to create a financial plan in Envestnet MoneyGuide |
| Access to the SEI proposal tool | Single Sign On (SSO) to Proposal Builder and where data will prepopulate |
| Support | For assistance with you SEI and MoneyGuide integration, please contact the Integration Specialist Team at integration@seic.com |

## Set-Up Procedure

### Authorization

To initiate the integration between Envestnet MoneyGuide (MoneyGuide) and the SEI Wealth Platform, the first step is to complete the MoneyGuide integration form which authorizes SEI's connection to MoneyGuide for your firm.

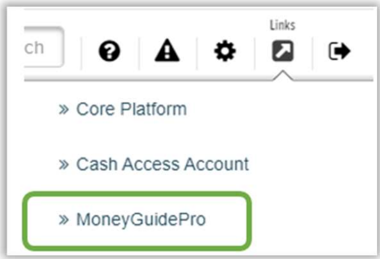
› The MoneyGuide integration form can be obtained by navigating SEIAdvisorCenter.com, and launching the *Manage Forms* page under the "Business" menu.

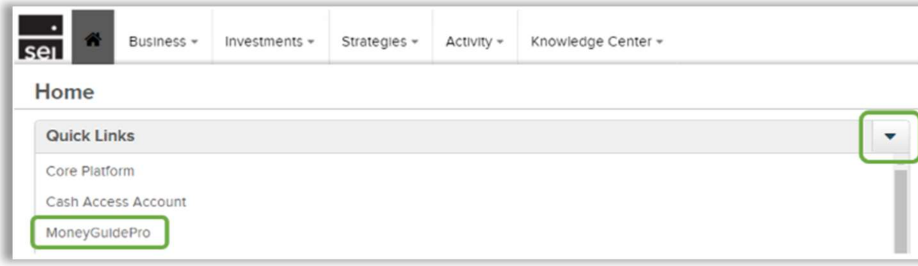
› Once on the *Manage Forms* page, select *Launch* and then the *Advisor Admin Forms* radio button, select the *Data Feed/Download Forms* drop down and select the *MoneyGuide Integration Form*.

› Complete the form and submit. Once the form is complete, a member of The Integration Specialists will contact you regrading next steps.

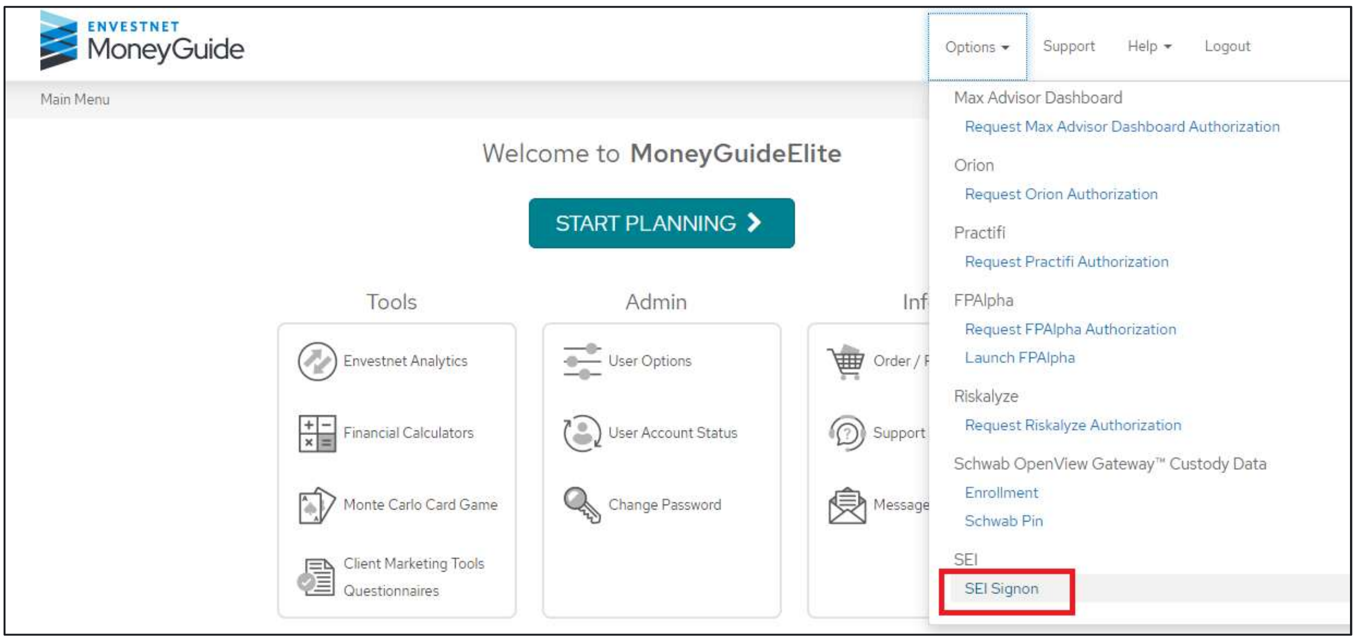
### SEI has established your integration with MoneyGuide, now what?

› Once you receive confirmation from The Integrations Specialist Team, log into SEIAdvisorCenter.com. On the homepage, set one of the portlets to *Quick Links*. You can also access from the *Links* in the upper right of the site.



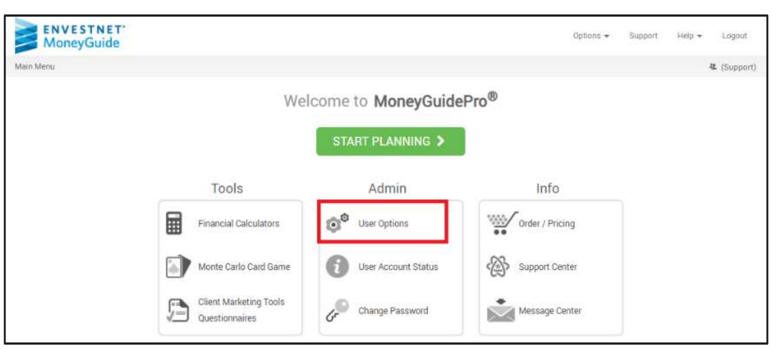




- A new tab will open in your browser and you will be brought to the MoneyGuide login page. Enter your MoneyGuide user credentials to access MoneyGuide.
- Once in MoneyGuide, select the Options dropdown menu and select the “SEI Signon” option to validate that you can log back into SEIAdvisorCenter.com.



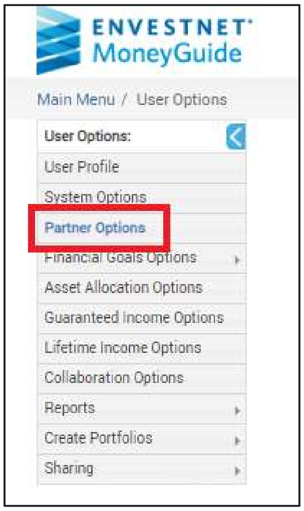

- Enter your credentials into the SEIAdvisorCenter.com login page and access the site.
    - After you enter your username and password on the login page and move to the multi-factor authentication page, make sure you check the box for “Register this device.” This allows you to keep the integration set without always having to reenter your password.

      **NOTE**: You will have to update your password every 90 days.
- Once you validate that you can access SEIAdvisorCenter.com, navigate back to the MoneyGuide main menu, select *User Options*:



› Once on the *User Options* page, select *Partner Options* from the User Options drop down menu. Select the *Yes* radio button next to "Allow SEI" and "Allow SEI Proposal" fields.

  ○ You do NOT need to enter the SEI Firm Id in the designated field.





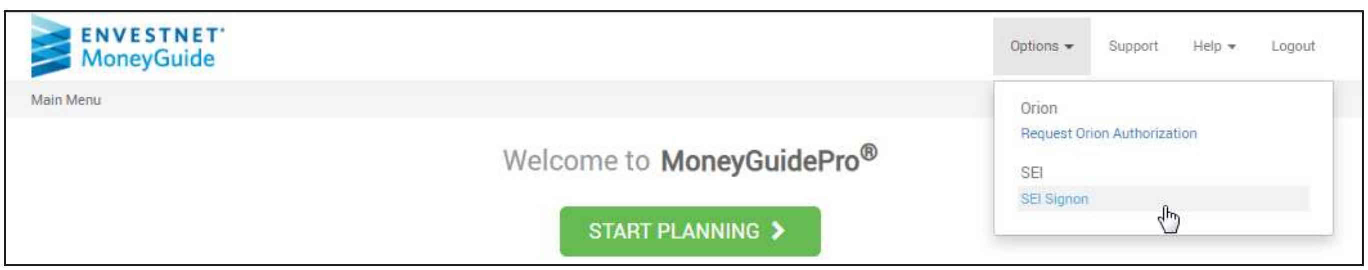
## Single Sign-On (SSO) Integration

This feature provides you with the ability to navigate between SEI Advisor Center and MoneyGuide with a single click and without having to log back into either system.

You can SSO from SEI Advisor Center to MoneyGuide home page and vice versa.

Below are the steps on how to SSO between the two systems:

› On the MoneyGuide *Main Menu* page, select the *Options* dropdown menu in the right corner menu bar. From the dropdown, select *SEI Signon*.




› This will bring you to the SEI Advisor Center homepage.

  ○ If needed, enter your SEI Advisor Center credentials as if you were to login directly.

    ▪ After you enter your username and password on the login page and move to the multi-factor authentication page, make sure you check the box for "Register this device." This allows you to keep the integration set without always having to reenter your password.

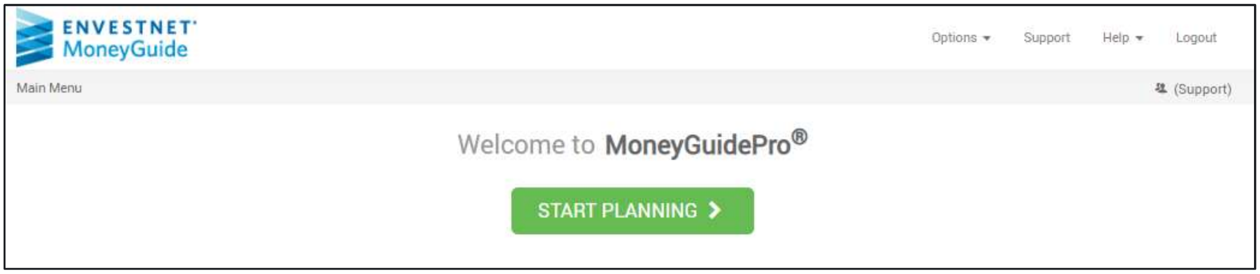
  **NOTE**: You will have to update your password every 90 days.

› Once logged into SEI Advisor Center, select the "Links" icon in the top right corner menu bar. In the dropdown, will be the option for *MoneyGuide*. This will bring you back to the MoneyGuide Main Menu.

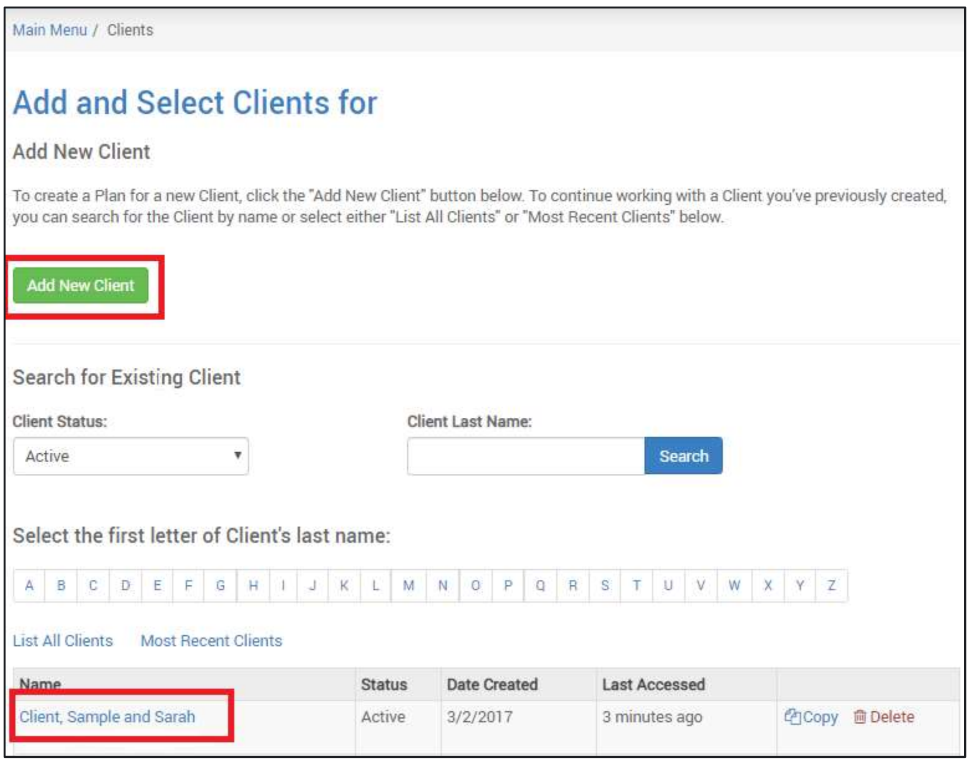
## Client and Household Syncing

One of the benefits of the SEI/ MoneyGuide integration is the ability to sync SEI client or custom household holdings data in real time in MoneyGuide. Follow the below steps to sync a SEI client or household:

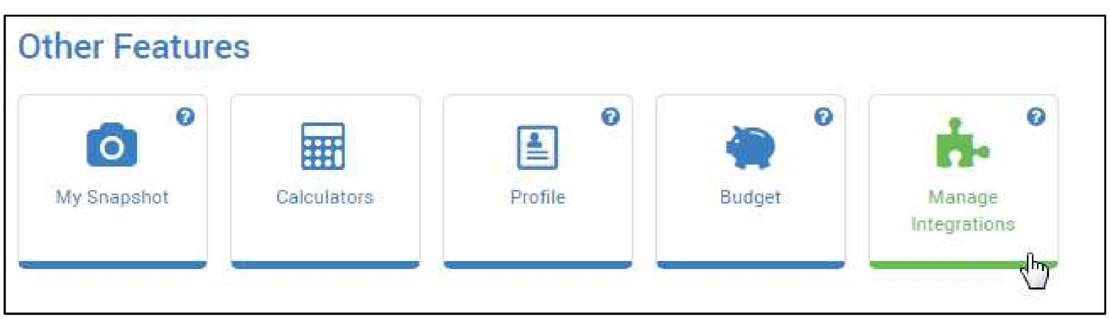
› From the MoneyGuide Main Menu, select the *Start Planning* button.




› Once in the Clients page, in an existing client for whom you want to pull in holdings data or add a new client.



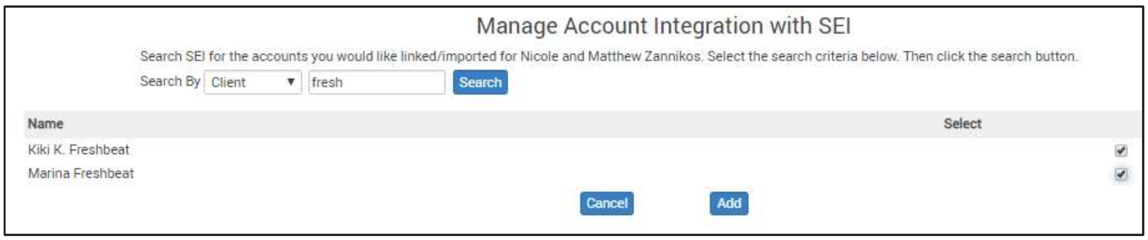

› In the context of the client with whom you want to obtain holdings data, select the *Manage Integrations* button.



› Select the SEI icon from the integrations list.

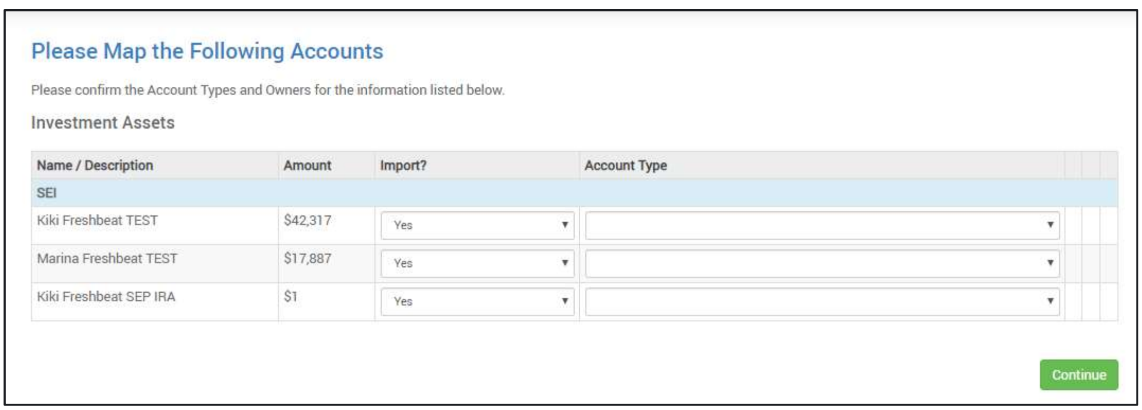

› Search for the client or household for whom you'd like to integrate by entering a client name and selecting the *Search* button.

- For best results, enter the client's last name. A list of your clients or households with the name or part of the name you entered will populate. Check one or more of the clients with whom you'd like to associate.
- Once you've selected the clients to associate with the plan, select the *Add* button.



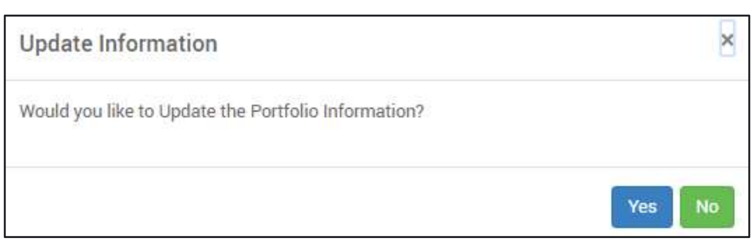

› Verify the accounts you would like add to your plan and then select the *Continue* button.

- Be sure to enter the account type from the dropdown menu prior to selecting the *Continue* button.
- If there are multiple owners on the account, select the proper owner from the dropdown




› To verify that the sync occurred correctly, return to the Clients page. Underneath the name of the client with whom you've just synced, the phrase "Integrated with SEI" will appear.

› The next time you go to create or modify a plan for the client that has been synced with SEI, a box will populate asking you if you want to update the holdings information from SEI to MoneyGuide. Proceed by either selecting *No* or *Yes*.



## SEI Capital Market Assumptions and Model Data

SEI's capital market assumptions and model allocation data are automatically embedded into MoneyGuide as a method to align the plans you create for your clients to the SEI model that you're already using.

## Access to the SEI Proposal Tool

For a seamless transition from creating a plan to creating a proposal, SEI offers access to the SEI Proposal Builder directly from MoneyGuide.  MoneyGuide will prepopulate the SEI proposal tool with the following data:

› Current account data (Holdings and asset information)

› Client data and co-client data

› Any goal data available

Below are the steps to access the proposal tool via MoneyGuide:

› In MoneyGuide, navigate to the *Clients* menu and select any client that has the text "Integrated with SEI" under their name.

› Once within the context of the client, on the *My Plans* page, select the hyperlink for one of the plans that you've created for your client.

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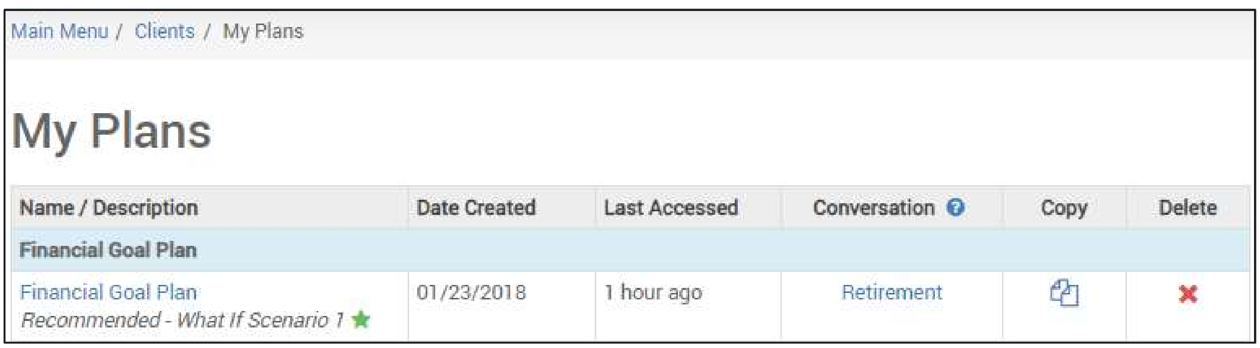
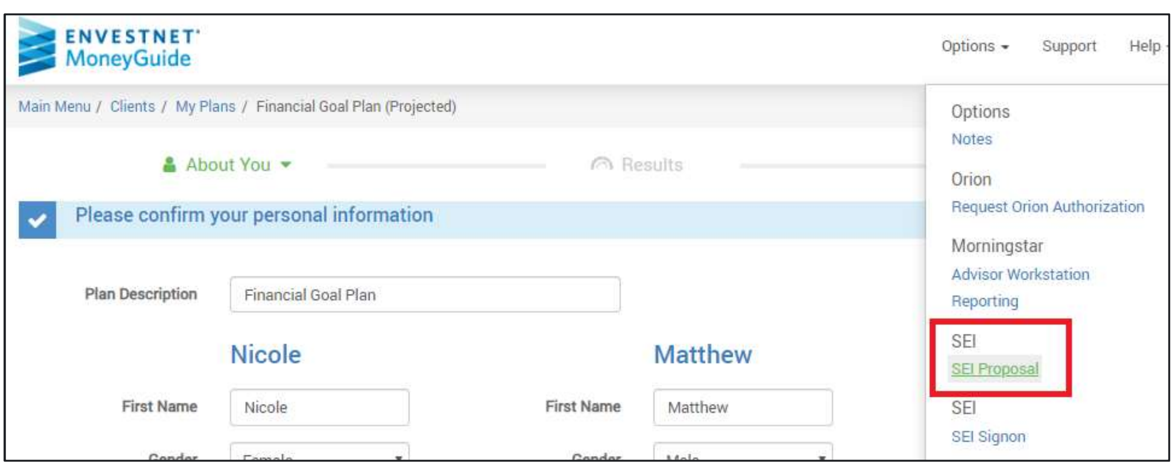
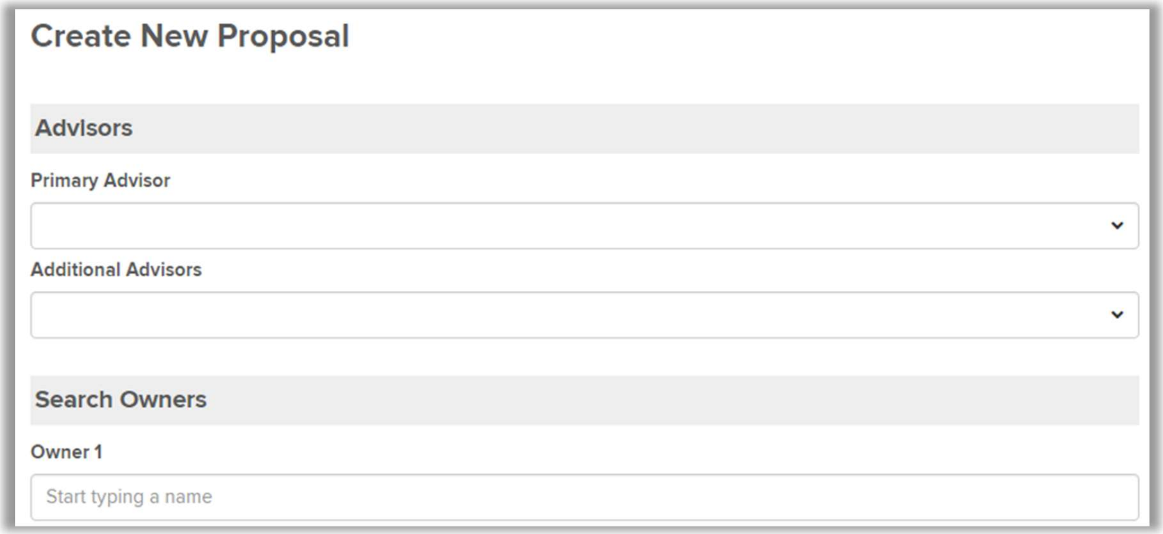



› While in the context of the plan, select SEI Proposal from the Options dropdown menu in the top right corner of the page.



› Selecting this link will bring you to the proposal tool page




## Support

For any questions regarding the SEI and MGP integration, please contact your SEI service team 1-800-734-1003. You may also contact the Integration Specialist Team at integration@seic.com.