SEI Private Trust Company

SEI Wealth Platform Financial Advisor User Registration / Change Form

Instructions:

This form is designed for granting individuals in your firm "Financial Advisor" access to the **www.SEIAdvisorCenter.com** and **www.SEIBusinessBuilder.com** websites (the "Websites"). This form must be signed by an Authorized Representative of the firm. All information must be provided to establish access. SEI will establish each User ID within two business days. Once the User ID for the **www.SEIAdvisorCenter.com** is established, two e-mails will be sent to the e-mail address provided on the form (one will contain the User ID and the other will contain the password). The user will need to register his/her User ID and password at **www.SEIAdvisorCenter.com**. Once that registration has been completed, the user will be able to sign on to **www.SEIBusinessBuilder.com**. The User ID and password for **www.SEIBusinessBuilder.com** can be disregarded.

If you have questions about this form, call your Service Team at 1-800-734-1003.

Forward completed form to:

SEI Private Trust Company
Attention: Independent Advisor Solutions by SEI (Service Team)
P.O. Box 1098
Oaks, PA 19456-9907
OR Fax: 610-676-1021

Section 1 Request Type

Indicate whether this request is to grant a new user access, or to modify or delete an existing user's access, to the Websites.

Section 2 Advisor Information

Provide all user information requested in order to establish "Financial Advisor" access for the user.

Section 3 Access Level

The "Financial Advisor" role can be assigned at multiple levels to give the user access to an entire firm or advisor(s) based on what is selected in this section.

Section 4 Authorization

This form must be signed by a Firm Authorized Representative.

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Scan as: Internet – Advisor (SWP)

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❶ Request Type (select one)

☐ New User ID

☐ Modify Existing User ID SEI User ID: ________________________

☐ Delete Existing User ID SEI User ID: ________________________

❷ Advisor Information

All information is required. Upon enrollment a password and User ID will be e-mailed to the address provided below. The last four digits of your Taxpayer Identification Number and your mother's maiden name will be used to verify your identity if you forget your password or have any inquiries about your internet access privileges.

User's First Name	User's Last Name	Telephone Number
E-Mail Address	Last Four Digits of Taxpayer Identification Number	Mother's Maiden Name
Advisory Firm Name	Doing Business As Name (if applicable)	Broker-dealer Name (if applicable)
Advisory Firm Address	City, State, Zip Code	

Advisor will be granted access to the "Financial Advisor" role on the SEI Wealth Platform. This role will give the Advisor access to all accounts to which he/she is tagged. The Advisor will have the ability to create households, upload forms, "Launch and Print" all maintenance forms, "Launch and Submit" account applications and RIA and BD-approved straight through transactions, and download documents and data from the SEI Wealth Platform. This role will grant the Advisor access to view the Fee Revenue Dashboard, which includes a summary of advisory fees taken over the previous 15 months and the detail of those fees for each of the clients and accounts that the Advisor has access to view. Advisor and client signatures will be obtained electronically if allowed by the Advisor's office.

If you are an admin or need to assign a role not offered on this form, please use the **SEI Wealth Platform User Registration/Change Form.**

❸ Access Level - Please complete this section to indicate the level at which the Advisor should access his/her clients and accounts. When modifying the access of an Advisor who already has access, please indicate the specific role(s) that should replace his/her current access.

Required: (select one)

☐ Financial Advisor: Advisor will be granted access to all accounts to which he/she is tagged

OR

☐ Financial Advisor - Read Only: Advisor will be granted View Only access to all accounts to which he/she is tagged

Optional: (select one)

The following firm level roles are available to those authorized to have access to the entire firm. If Firm-level access is selected, this form must be signed by an Authorized Person from the firm.

☐ Firm - All Processing: Advisor will be granted access to Submit Launched Forms, Trades, Cash Management, Portfolio Strategy Management, Fees and Client Maintenance at the Firm Level

OR

☐ Firm - Read Only: Advisor will be granted access View Only access to all accounts under the Firm

❹ Authorization

I acknowledge that, by using the Website, I consent to the **www.SEIBusinessBuilder.com** and **www.SEIAdvisorCenter.com** terms and Conditions of Use, as set forth on the Website, which are made part hereof. All firm level requests require a principal signature.

User's Name	User's Signature	Date
Authorized Person's Name and Title*	Authorized Person's Signature*	Date

*This person is an authorized signer for the Firm and should not be the same person as the requestor unless he/she is the authorized signer for the Firm.