

SEI New ways.
New answers.®

YOUR SEI ACCOUNT INFORMATION. ONLINE. TIMELY. ACCURATE.

How to set up SEI ClientConnect

Download current investment account information directly into Quicken® and better manage investment accounts, along with personal and household finances:

- › Consolidate financial information
- › Save time and money at tax time
- › Forecast cash flow
- › Get instant insights into spending patterns
- › Create a budget and save more money

With SEI ClientConnect, you can quickly and easily review your account information and download to Quicken® at your convenience to coordinate and better manage both your investments and your personal finances.

The ClientConnect website is designed for easy navigation both to and through your account. You can enjoy quick, timely key information:

- › Account summary
- › Account activity
- › Portfolio holdings details
- › Online statements
- › Gain/loss information

And with the Account Grouping feature, you can easily view consolidated information across your priority SEI accounts.



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New User to SEI ClientConnect? Sign Up and Get Immediate Access to Your Account Information

- 1 Visit seiclientconnect.com and on the home page, select the link that says **Sign Up to View Your Account(s) Online**
- 2 Read and agree to the Terms of Use by clicking **I Agree**
- 3 Complete your profile by registering your Personal Information
- 4 Enter your account number(s) as provided by your advisor, as well as your tax ID (this is for security purposes)
- 5 Select “eStatement” or “Paper Statement” as your statement delivery preference. If “eStatement” is chosen in the above step, a window will pop up that confirms your consent to receive electronic statements.
- 6 **Congratulations!** Your login information and password will be provided and you now have access to the site. *(Please note that your first time logging in, you will be prompted to accept the terms of agreement in order to register your ID, and for security purposes, you will be asked to set up a few security questions.)*



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Already a user of SEI ClientConnect but want to sign up for eStatements?

Now you can download your investment account statement at your convenience—directly from ClientConnect!

- › Faster access to your statements—up to one week earlier than paper
- › Less clutter—print out only if you wish
- › Environmentally friendly—saving paper and landfill space



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To sign up, simply:

- 1 Register at seiclientconnect.com and sign in.
- 2 Go to **My Documents** using the drop down function on the left side of the page. Then select the **Statement folder**.
- 3 Select **Go Paperless**.
- 4 Switch your statement delivery preference from paper to eStatement and provide email address if necessary.
- 5 Your consent to receive electronic statements will be confirmed.



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Your statement delivery preferences are now saved and beginning in the next statement cycle, you will receive your statement notifications via email. Simply go to ClientConnect at your convenience to review them.



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For answers to your questions about using ClientConnect, please contact your financial advisor.

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