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Goals-based investing by SEI available on the Aviva Platform

in association with

SEI New ways.
New answers.®



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The Aviva Platform offers a broad investment range to your clients.

To complement our existing offering, we've worked with investment experts SEI to develop a goals-based planning portal alongside the Aviva Platform.

What is goals-based investing?

Goals-based investing helps you:

- enhance client engagement
- streamline your advice delivery
- align your advice better with the way clients think about their wealth.

Designed by SEI and fully integrated with the Aviva Platform, the portal includes purpose-built technology to help guide your client conversations. The new offering is underpinned by SEI's institutional-quality strategic portfolios.

The Aviva Platform – a broad range of investment solutions

- **A fully open architecture platform.**
- **Offers access to a broad range of investments across the market.**
- **Includes access to insured funds, external funds, structured products and exchange traded funds.**
- **Also offers managed funds, model portfolio functionality and a range of over 30 externally managed discretionary fund management models.**

Empowering you to overcome today's challenges

The portal allows you to offer a differentiated advisory service and foster long-term client relationships.

- **Talk differently**

Goals-based investing can help you engage differently with your clients, have more meaningful conversations and ultimately build deeper relationships with them. The approach focuses on what really matters most to them – their life goals.

- **Invest differently**

SEI builds and manages its strategic portfolios to align with a range of client goals. This allows you to invest their money according to the specific risk tolerance and timescale for each individual goal.

- **Report differently**

Performance against a benchmark doesn't indicate whether clients are actually on track to achieve their goals. SEI's technology produces progress-to-goal reporting that gives clients easy-to-understand information, measuring progress towards their personal goals and allowing them to visualise that journey.

Features of goals-based investing

How it can benefit your client	How it can benefit you as an adviser	How it can benefit your business
<ul style="list-style-type: none">● Allows your client to identify, prioritise and better understand the achievability of goals.● Provides your client with a rational and disciplined investment approach throughout market volatility and cycles.● Clients can visualise the investment journey to better identify the steps necessary to make life-changing decisions.	<ul style="list-style-type: none">● Lets you have more meaningful interactions with clients, helping to build stronger relationships.● Allows you to demonstrate greater value to clients through financial planning rather than a product-focused approach.● Lets you select portfolios that are better aligned to the specific client goals.	<ul style="list-style-type: none">● Lets you offer a scalable and consistent client proposition.● Allows you to use technology to better capture key client information and deliver business efficiencies.● Lets you implement an institutional grade investment solution within your centralised investment proposition.

Aviva and SEI working together

To complement our existing offering, we've worked with SEI to deliver an integrated investment and advice process.

This fully integrated process allows client information to pass seamlessly from SEI's technology to the Aviva Platform. You'll only need to input the information once, helping you save time and money.

Assessing the suitability of client investments remains your responsibility. However, SEI also has continuous monitoring and checks in place to make sure the technology delivers a robust client experience.

Find out more about goals-based investing and the Aviva Platform

To learn about goals-based investing, please contact SEI's UK Adviser Team on 0203 810 8001 or sei_intermediaries@seic.com.

If you'd like to know more about the wider range of investment solutions available through the Aviva Platform, please contact your usual Aviva consultant or visit [Aviva for Advisers](#).

Important information

The SEI Strategic Portfolios are a series of the SEI Funds and may invest in a combination of other SEI and third-party funds as well as in additional manager pools based on asset classes.

Please remember the value of your client's investment can go down as well as up and isn't guaranteed. They may not get back the amount invested

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