

Attivo Investments and SEI Co-CIO



Attivo
Investments

Attivo Investments has established a strategic partnership with SEI through a Co-CIO operating model to deliver investment solutions that we believe provide exceptional value to clients while retaining full regulatory permissions to manage client investments and maintain complete oversight and decision-making authority over investment strategies.

SEI actively participates in the Investment Committee, contributing its expertise to design and develop aligned investment solutions while granting access to preferential share classes.

To identify the most suitable partner for this innovative Co-CIO arrangement, Attivo Investments conducted a thorough market review of firms offering similar models. This comprehensive evaluation ensured that SEI was the most aligned and capable partner to support Attivo's mission of delivering value-driven client-focused investment solutions.

Co-CIO Selection Process

Attivo Investments conducted a comprehensive market review of firms offering a Co-CIO partnership model. We needed a partner whose investment approach and strategic vision aligned seamlessly with Attivo Investments' commitment to goal-based investing — moving beyond traditional risk vs return frameworks to solutions that align with financial planning conversations and client outcomes.

Through this evaluation, SEI was the most aligned and capable partner to support Attivo's mission of delivering value-driven, client-focused investment solutions.

Thorough Due Diligence

To ensure our chosen partner exceeds the standards we demand for our clients, the review process covered:



Financial Stability

Rigorous analysis of the partner's financials to ensure long-term sustainability.



Expertise and Performance

Comprehensive evaluation of historical performance and fund management expertise.



Client Feedback

Testimonials from existing clients to assess service quality and delivery.



Technology and Fund Access

Rigorous analysis of the partner's financials to ensure long-term sustainability.



Pricing and Cost Efficiency

Competitive pricing without compromising on quality.



Culture Alignment and Vision

A shared ethos and commitment to innovation and client outcomes.



Resources and Strategic Partnerships

Depth of resources and strong global partnerships to drive forward-looking investment strategies.



Business Resilience

Size and scale to ensure a robust risk mitigation and operational resilience for clients.



Regulatory Compliance

An assessment of the strategic partner's adherence to global regulatory standards, ensuring alignment with FCA and MIFIDPRU requirements.

SEI has undergone a Section 166 review, and Attivo Investments was aware of this during the selection process. It was considered as part of the due diligence, and they are satisfied with the outcome.



Introducing SEI: Our Co-Chief Investment Officer

We recognise that you expect your financial planner to take an increasingly comprehensive approach to looking after your wealth.

This is why we have collaborated with SEI, a long-time leader in investment management. SEI will support our in-house team in developing a sophisticated and innovative investment approach, which should help you achieve your investment goals.

Why has **Attivo Investments** partnered with **SEI**?

Investor focused

SEI have been responsible for several innovations that have enhanced the way the investment industry manages wealth. Their goals-based philosophy stands to strengthen the advice we give by helping us prioritise what's important to you.

Long and **successful history**

For over 50 years, SEI has been supporting businesses and is a NASDAQ-listed business with offices around the world, and a strong balance sheet. Today they manage and advise approximately £369 billion in assets under management*.

Significant **resources**

SEI's scale means they have significant resources at their disposal, which we can leverage.

Market access

SEI is a leading provider of manager-of-managers solutions. Through this partnership, they will help us globally identify best-in-breed managers, including those traditionally reserved for the institutional market.

Keeping **good company**

In partnership with SEI, we offer you a sophisticated institutional approach to asset management also used by some of the world's largest pension schemes, private banks and ultra-high net worth families.



At the forefront of **innovation**

With 5,000 employees, SEI drives growth through collective knowledge and industry connections. For 55 years, they have delivered impactful solutions, leveraging diverse perspectives to enhance financial technology and asset management. Over the years, SEI have launched various innovative, cost-effective investment solutions while in sourcing and seeding exciting new managers:

1995

One of the first to employ a manager-of-managers approach, reducing the risks and costs associated with multi-manager investing.

2004

Co-developed and launched market's first low (managed) volatility strategy in the US providing cautious investors with the opportunity to reduce equity risk, but without compromising potential returns.

SEI has deep experience in sourcing and seeding exciting new managers.

2009

Partnered with Brigade Capital Management to translate their private credit investment approach to their high yield bonds strategy.

2013

Developed quantitative investing approach seeking to deliver better risk adjusted returns more cost efficiently.

2015

Seeded Dynamic Beta Investments (DBi) to develop a liquid alternatives strategy for retail investors.

2017

Partnered with Towle & Co. to provide UK investors with access to their US small cap value strategy.

2018

Early adopter of Marathon to bring specialist emerging market debt skillset to retail clients.

2024

Early adopter of Brickwood Asset Management to retain access to expertise of long favoured manager team.

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