

Our partnership with SEI Investments

High Point Community Foundation has partnered with SEI, a leading asset manager with more than 475 clients worldwide, as our Outsourced Chief Investment Officer (OCIO) to maximize the foundation's investment assets. As a donor, you will greatly benefit from this strategic partnership in the following ways:

INVESTMENT OPTIONS

A variety of investment options that allows you to select an investment strategy that best supports your preferences

WELL-DIVERSIFIED FUNDS

Well-diversified funds using some of the world's best money managers selected via SEI's leading multi-manager program

OVERSIGHT AND GOVERNANCE

Extensive oversight and governance through multiple layers of risk management and fiduciary accountability that ensure our donations are being invested and managed properly.

A COST-EFFICIENT MODEL

A cost-efficient model designed to reduce investment fees, help grow investment and strengthen support for the mission.

Who is SEI?

- › **Global firm** with U.S. headquarters in Oaks, PA
- › **\$89.5 billion** in institutional assets under management
- › **180-plus nonprofit clients** worldwide, with over 25 community foundation clients
- › **25-year track record** in discretionary investment management designed to help improve efficiency and results
- › **Significant infrastructure** and resources with a dedicated group focused on understanding the needs of nonprofits
- › **Significant annual investment** in research tools and technology for investment and risk management
- › **Named “Top OCIO Provider”** at the Fund Intelligence Institutional Asset Management Awards two consecutive years (2017 & 2018)
- › **Named a leading outsourcer** ranked by worldwide assets from 2011 through 2018 by Pensions & Investments
- › **Ranked in the top 10% of money managers** based on worldwide institutional client assets by Pensions & Investments

