SEI Summer Internship Program

2022 Position Descriptions Business Track.

2022 Summer Internship Program - Available Positions

Business Track

- Enterprise Risk Management – Risk Management
- Independent Advisor Solutions – Sales
- Institutions – Marketing
- Investment Management Unit – Sustainable Investing
- Private Banking – Large RIA
- Private Wealth Management – Marketing & Legacy
- SEI Wealth Platform – Quality Assurance Analyst

Enterprise Risk Management – Risk Management

Position Status: Hybrid

Unit Description

The Enterprise Risk Management (ERM) Team is SEI's centralized unit responsible for identifying events or circumstances relevant to the organization's risks and opportunities, assessing them in terms of likelihood and magnitude of impact, determining a response strategy, and monitoring progress against that response strategy. SEI's ERM Team is currently organized around five risk functions: Operational Resilience, Third Party Risk Management, Information Governance, Insider Threats, and Corporate Insurance. The team also has two additional specialized risk analysts who focus on financial modeling, counterparty risk, scenario analysis, geo-political risk, and Environmental, Social, & Governance (ESG) related risks.

Position Description

This Summer Internship will expose the candidate to all functions on our Enterprise Risk Management team. However, the position will work most closely with our current counterparty risk analyst on a variety of assessment and reporting activities. Specifically, the summer intern will be asked to assist with annual country risk assessments, counterparty risk assessments, financial due diligence of our third party service providers, and some specific scenario analysis and risk quantification projects. The work will be a mix of routine risk assessments with well-defined procedures, and other, newer risk quantification projects that are less-defined and open to creative input.

Required skills/attributes: Candidate must be comfortable with the Microsoft Office software suite and general computer skills, particularly Excel (.xls). Candidate is likely in a finance, economics, or risk management major. Candidate should have good written communication skills.

Preferred skills/attributes: An interest in risk quantification methods is preferred, but not required. This includes evaluating and measuring financial risk, financial modeling, Monte Carlo simulations, and statistical analysis as applied to risk events and outcomes.

Independent Advisor Solutions – Sales

Position Status: Hybrid or in the office

Unit Description

The Independent Advisor Solutions (IAS) Unit provides independent financial advisors with wealth management services through outsourced investment strategies, administration and technology services, and practice management programs. It is through these services that SEI helps advisors achieve their goals, no matter if that's save time, grow revenues, differentiate themselves in the market, or fostering an environment to create deeper connections with clients.

With a history of financial strength, stability, and transparency, IAS has been serving the independent financial advisor market for more than 20 years and has over $95.8 billion in advisors' assets under management, IAS is a strategic business unit of SEI.

IAS sits at the intersection of finance and technology, providing independent financial advisors with personalized yet scalable investment management services through a single, unified technology and administration experience, in order to create deeper connections with clients. It is through these services that SEI helps advisors save time, grow revenues, and differentiate themselves in the market.

Position Description

As part of the SEI Summer Internship Program, IAS will prepare interns for an exciting career at a fast paced, and innovative fin-tech company. Interns will rotate throughout multiple client service and sales segments, our business development team, and our digital engagement and distribution team to become immersed in the client experience and truly develop an understanding of what being a full-time member of the team is like.

Interns will learn sales and relationship management skills, become proficient at profiling and active listening, master various presentation techniques, learn about sales & advisor technologies, and the investment markets/ the global economy. In addition to those areas listed above, interns will also become fluent in equity/ fixed

income/ alternative investment concepts and how portfolios are built and used to solve the needs of end investors.

Required skills/attributes:

- Prior work experience, experience within the Financial Services industry strongly preferred
- Working knowledge of Microsoft applications (Word, Excel, PowerPoint, etc.) and CRM systems
- Excellent communication, both written and oral
- Natural curiosity and inquisitiveness
- Perseverance when faced with obstacles
- Logical and analytical thinking
- Independence and proactivity
- Strong organizational skills

Institutions – Marketing

Position Status: Hybrid or remote

Unit Description

We provide technology and asset management services across the continuum of institutional investors ranging from those with internal investment operations to those that outsource investment implementation.

Position Description

The Institutional Marketing team is responsible for marketing investment and technology solutions to institutional investors, including nonprofits, corporations, healthcare systems, and unions. The team is responsible for all efforts to grow the institutional business, including: lead generation, RFPs, presentations, website management, collateral and client and prospect communications.

The Institutional Marketing Intern will be responsible for assisting with marketing communications and lead generation efforts, including:

- Updates/refreshing slides and finals presentations
- Updating client lists and fulfilling client ad requests
- Campaign tracking and reporting (Google Analytics and Eloqua)
- Web content, linking and updates (Drupal CMS)
- Social media posting/promo
- Inbound lead research and follow-up
- Assisting with Salesforce conversion/setup

The intern may also gain exposure to other digital technologies, including: paid search (Google Ad Words), ABM (6 Sense), Uberflip and Ceros.

Required skills/attributes:

- Experience with Microsoft Office Suite
- Learns quickly / Self starter (We will train)
- Efficient and organized

Preferred skills/attributes:

- Digital marketing coursework/experience

Investment Management Unit – Sustainable Investing

Position Status: Hybrid

Unit Description

The SEI Investment Management Unit (IMU) is responsible for creating and maintaining an array of both proprietary and custom mutual funds, mutual fund model portfolios, separately managed account portfolios and alternative investments. The IMU also provides extensive research and reporting on investment managers, financial markets and other investment topics.

Position Description

The IMU Strategic Planning and Stewardship Group conducts long-term strategic planning and oversight for SEI's investment management business, including risk management and sustainable investing. The Sustainable Investing team within the group is responsible for the development of SEI's sustainable investing strategy, capabilities, products and solutions.

The Sustainable Investing Intern will play an essential role in the continued development of SEI's approach to sustainable investing by contributing to research and strategic projects related to integrating sustainability into investment products, reporting, risk management, and client engagement. The intern will work cross-functionally within the Strategic Planning and Stewardship Group, across SEI's Investment Management Unit, and in collaboration with key stakeholders in the market units.

Core responsibilities will include conducting research into trends and opportunities across the investor, regulatory and competitive landscapes, and synthesizing findings into actionable insights and recommendations. The intern may also contribute to the development of sustainable investing communications and materials for internal and client audiences, and conduct analysis of SEI investments using internal and third-party sustainability data.

Required skills/attributes:

- Self-starter able to work both independently and as part of a team to drive progress on important projects and initiatives.
- Excellent attention to detail and communication skills – written, verbal and presentation skills.
- Strong analytical and Excel skills. Comfort working with and drawing insights from data.
- Intellectually curious and open minded.
- A demonstrated understanding of and/or passion for climate change and other sustainability issues.

Preferred skills/attributes:

- Coursework in finance, business, or related field.
- Solid capabilities in PowerPoint.
- Strong problem solving skills.
- Ability to synthesize qualitative and quantitative information.

Private Banking – Large RIA

Position Status: In the office, hybrid or fully remote

Unit Description

SEI Private Banking provides wealth management organizations the infrastructure, operations and administrative support necessary to capitalize on their strategic objectives in a constantly shifting market. Our solutions integrates people, processes and technology to go beyond data center management and application development to handle most back-office operational processes associated with marketable securities. SEI's Private Banking business currently supports 112 bank, trust and wealth management organizations.

Position Description

SEI Private Banking has recently launched a new market segment targeting Large RIAs. The goal is to connect with these organizations and learn about their current challenges and opportunities. We believe the audience is well suited for a number of SEI solutions, including the SEI Wealth Platform.

As this is a new market there are a variety of market research and learning opportunities and intern can support. We are leading with a digital first marketing solution and looking to leverage analytics to drive our learning. Intern responsibilities will include but are not limited to:

- Prospect profiling
- Web research to help fill out our Salesforce data – researching who the CTOs and COOs are at each target firm

- 6sense alert research – monitoring 6sense alerts that show engagement with LRIA web content and researching the firms so we can decide if we should reach out to them or for those outside our universe, if they could be a fit anyway.
- Researching industry events
- Potential research project to look at firms in the gap between IAS and PB ($250 million to < $1Billion AUM) to help us learn more about these firms.
- PPT presentation visuals
- Content development/competitor research – help us gather and evaluate content being published by our competitors to see how it aligns or differs with what we're doing.

Required skills/attributes: Basic skills we would expect an intern to have – willingness to learn, ask questions, adaptable, etc.

Private Wealth Management – Marketing & Legacy

Position Status: In the office, hybrid or fully remote (with preference for hybrid)

Unit Description

$4B Wealth Management firm w/in SEI providing Goal Directed Advice to clients in the areas of Investments, Estate Planning, Philanthropy, Risk Management, Cash Flow and Reporting.

Position Description

Work within both Marketing and Legacy Team.

1. Marketing Team creates awareness and facilitates lead generation. More specifically creates content, manages digital campaigns and coordinates events.

    - Conduct review and audit of current PWM marketing collateral system
    - Oversee the update of materials for content & new brand redesign
    - Analysis project on digital metrics for inbound campaigns
    - Prospecting mapping project in wealth database

- **Legacy Team** provides client advice and support in the areas of testamentary planning, wealth transfer, family communication and philanthropy.

    - Research for content creation
    - Opportunity to write new content (with my oversight)
    - Updating of current content for new laws or minor adjustments
    - Updating COI matrix and other info to support sales/lead gen
    - Opportunity to help create client deliverables (power point work)
    - Research for unique client questions
    - Assistance with dashboard updates (client data)
    - Clean up of docvault (retitling of files)
    - Assistance with solutions dev projections.
    - (I suspect there will be work on segmentation and creation of tools)
    - There will always be a "new project" underway that could use support

Required skills/attributes:

- Good writer, Creative, Independent worker

Preferred skills/attributes:

- Word, PowerPoint, Excel, Curious and problem solver

SEI Wealth Platform – Quality Assurance Analyst

Position Status: In the office, hybrid or fully remote

Unit Description

We created the SEI Wealth Platform to assist our clients worldwide with their wealth management and investment processing needs. The scope of the Platform is enormous and includes:

- Client relationship management
- Investment management
- Portfolio accounting
- Transaction initiation
- Order management
- Trade execution
- Clearing
- Currency and foreign exchange processing
- Corporate actions processing
- Reconciliation
- Financial (reference) data management
- Financial planning; portfolio management
- Reporting
- Operational workflow

We are building components in-house as well as buying and integrating best-in-class industry components. The technical environment includes: Java, Java BPM (Camunda), Angular, Docker Containers, Kubernetes, Artifactory, Maven, Weblogic/ Tomcat application containers, Oracle, Eclipse / IntelliJ developer IDE's, Spring Boot, Spring Cloud, OpenAPI (swagger), jUnit, Apigee, Spring Framework, JSON / Rest Services, GIT, X86 / Linux, Oracle, Business Objects, Kafka, ZooKeeper, Elasticsearch, Kibana, Coherence, MS Azure, Microservices.

Position Description

The Quality Assurance (QA) team is responsible to ensure that all new development works as defined in acceptance criteria and all existing functionality still works as it does before. This is done through several testing cycles performed by the QA team. As an intern on the QA team you will have several functional parts of the testing cycle.

Team consists of approx. 140 team members located in Oaks, Canada, Nevada, Arizona and India. Team is responsible for testing ST, EST, UAT as well as creating automation. The team is also responsible to post warranty support after each OC and PSI release.

You will learn banking and advisory business from multiple levels and points of view:

- End Clients
- Advisors/Wealth Managers
- Middle Office
- Money/Portfolio Managers
- Administrators
- Audit and Regulatory Staff
- Operations

Once you have some background you will view these functions from a QA perspective to understand how we test new code to ensure quality is being delivered to our clients. You will learn the process to identify, write and execute testing scenarios. You will learn the entire QA process to do this, both from a manual and an automation standpoint. Also, the QA process is constantly changing and adjusting to new methods and you will contribute to that, too.

Required skills/attributes:

- Business acumen
- Business major