



SEI Investments Company

Locations: Pennsylvania (HQ)
Industries: Diversified Financials

RISK LEVEL:



Medium Risk

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DESCRIPTION:

SEI Investments is Medium Risk. The company often yields to political activism in shaping corporate governance, potentially alienating consumers, dividing employees, and harming shareholders. The company implements race and identity-based policies that replace merit, excellence, and integrity with preferential treatment and outcomes. SEI Investments occasionally embraces corporate initiatives that redirect its central focus from business goals to partisan policies and divisive issues at times. This approach fails to safeguard free exercise, free speech, and free enterprise.

Corporate Weaponization

Has canceled customers, suppliers, or vendors due to their political views or religious beliefs OR corporately boycotts, divests, or sanctions regions, people groups, or industries. Medium Risk

SEI Investments practices ESG screening conducted by BMO Global Asset Management's responsible engagement overlay (reo©) service for screening, engagement, and voting overlay (1). This screening could lead to the possibility of removing otherwise profitable investments from customer portfolios in the name of ESG. However, the firm also offers additional screens, such as religious screens removing companies providing abortion services (2)(3). the company is a signatory of the Principles for Responsible Investment, incorporating ESG issues into investment analysis, decision-making, and other business practices (4)(5). However, the company has not publicly canceled customers, suppliers, or vendors based on political views or religious beliefs (6).

Charitable giving (including employee matching programs) policies or practices discriminate against charitable organizations based on views or religious beliefs. Lower Risk

SEI Investments does not discriminate against charitable organizations based on views or beliefs (1).

Employment policies fail to protect against viewpoint or other discrimination and/or are ideological in nature. High Risk

SEI Investments provides unconscious bias training for its employees and plans to implement "Companywide training and awareness beyond implicit bias training" (1). The company does not provide viewpoint protections for its employees (1).

Corporate Governance and Public Policy

Uses corporate reputation to support causes, organizations, or policies hostile to freedom of expression. High Risk

SEI Investment's CEO signed the CEO Action for Diversity & Inclusion pledge, which includes a commitment to promote DEI through bias education training in the workplace (1)(2). The company promotes the UN's Principles for Responsible Investing, LGBTQ Pride Month, and several other diversity initiatives based on gender and race (3). It is a signatory of Climate Action 100+, committed to net zero carbon emissions by 2050 (4). The company implemented two new DEI positions, the "Director of DEI" and "Program Manager of DEI Reporting and Outreach", as part of its diversity initiatives (5). It also published a DEI commitment statement, a multiyear DEI strategic plan, and a DEI business case (6).

Uses corporate funds to advance ideological causes, organizations, or policies hostile to freedom of expression. Medium Risk

SEI Investments has donated \$109,000 to partnerships "focused on expanding the impact of global diversity and creating opportunities for youth of color" (1). Otherwise, there are no publicly known cases of the company using corporate funds to advance ideological causes, organizations, or policies (2).

Uses corporate political actions and/or financial contributions for ideological, non-business purposes. N/A

SEI Investments does not operate a PAC or engage in lobbying at this time (1)(2)(3).

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