

INVESTOR PROFILE

QUESTIONNAIRE SCORING GUIDE

This scoring guide is provided as a tool to help determine which asset allocation portfolio may be best suited to meet the needs of the investor.

Step 1: Indicate scores from each section below:

Investment Objectives (Section I) No Scoring necessary

Risk Tolerance (Section II) total score is _____

Time Horizon (Section III) answer is _____ years

Tax-Sensitivity (Section IV) score is _____		FOR INTERNET PROPOSAL INPUT ONLY
Score: 0-5 None 6-10 Medium 11-20 High	Tax-Sensitivity:	

Step 2: In the grid below, find your Risk Tolerance score and Time Horizon. The letter code in the appropriate box corresponds with a recommended portfolio.

		Risk Tolerance Score				
		0 – 12	13 – 24	25 – 36	37 – 47	48 – 58
Time Horizon (Years)	0 – 5	A	A	A or B	B or C	C or D
	5 – 10	A	A or B	B or C	C or D	D or E
	10+	A or B	B or C	C or D	D or E	E

Step 3: Select a portfolio based on asset allocation letter code from grid in Step 2 and the desired investment vehicle.

RECOMMENDED PORTFOLIO

Asset Allocation	Recommended Portfolios for Non-Taxable/Tax-Deferred Accounts*			Recommended Portfolios for Taxable Accounts	
	Mutual Fund Only Portfolios	Managed Account Portfolios**	Variable Annuity Portfolios*** (VP Series)	Mutual Fund Only Portfolios	Managed Account Portfolios**
A 100% Fixed Income	Institutional ¹ Fixed Income Institutional ¹ Core Fixed Income Domestic ³ Current Income	✓ ✓ ✓	N/A N/A N/A	N/A N/A N/A	✓ ✓ ✓
B 40% Equity/ 60% Fixed Income	Institutional ¹ Moderate Growth & Income Institutional ¹ Core Moderate Growth & Income Global ² Moderate Growth & Income Global ² Core Moderate Growth & Income Domestic ³ Moderate Growth & Income	✓ ✓ ✓ ✓ ✓	N/A ✓ N/A ✓ ✓	Tax-Sensitive ⁴ 40 (TS 40) Tax-Sensitive ⁴ Core 40 (TS Core 40) Active Tax-Managed ⁵ 40 (ATM 40 or ATM 40ex) Tax-Managed ⁶ 40 (TM 40)	✓ ✓ ✓ ✓
C 60% Equity/ 40% Fixed Income	Institutional ¹ Growth & Income Institutional ¹ Core Growth & Income Global ² Growth & Income Global ² Core Growth & Income Domestic ³ Growth & Income	✓ ✓ ✓ ✓ ✓	N/A ✓ N/A ✓ ✓	Tax-Sensitive ⁴ 60 (TS 60) Tax-Sensitive ⁴ Core 60 (TS Core 60) Active Tax-Managed ⁵ 60 (ATM 60 or ATM 60ex) Tax-Managed ⁶ 60 (TM 60)	✓ ✓ ✓ ✓
D 80% Equity/ 20% Fixed Income	Institutional ¹ Capital Growth Institutional ¹ Core Capital Growth Global ² Capital Growth Global ² Core Capital Growth Domestic ³ Capital Growth	✓ ✓ ✓ ✓ ✓	N/A ✓ N/A ✓ ✓	Tax-Sensitive ⁴ 80 (TS 80) Tax-Sensitive ⁴ Core 80 (TS Core 80) Active Tax-Managed ⁵ 80 (ATM 80 or ATM 80ex) Tax-Managed ⁶ 80 (TM 80)	✓ ✓ ✓ ✓
E 100% Equity	Institutional ¹ Equity Institutional ¹ Core Equity Global ² Equity Global ² Core Equity Domestic ³ Equity	✓ ✓ ✓ ✓ ✓	N/A ✓ N/A ✓ ✓	Tax-Sensitive ⁴ 100 (TS 100) Tax-Sensitive ⁴ Core 100 (TS Core 100) Active Tax-Managed ⁵ 100 (ATM 100 or ATM 100ex) Tax-Managed ⁶ 100 (TM 100)	✓ ✓ ✓ ✓

See the Key on the following page for an explanation of various concepts and terms on this page.

KEY

✓ Investment vehicle available

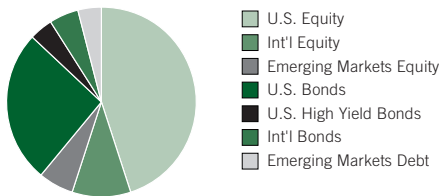
N/A Investment vehicle not available

* Non-Taxable/Tax Deferred Accounts include IRAs, qualified assets, variable annuity assets and for accounts where taxable gains are not an issue such as foundations, endowments, etc.

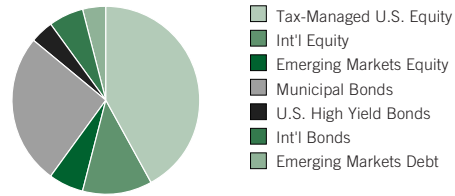
** Managed Account Portfolios can include a combination of SEI individually managed accounts and mutual funds (if desired). Underlying investment allocations will be similar to the corresponding SEI Mutual Fund Only Portfolio or can be customized to the investor's circumstances. Minimum of \$100,000 to \$250,000 per individually managed account manager. SEI mutual funds are combined with individually managed accounts when a recommended investment style is below a minimum of \$100,000 and if emerging markets and high yield bonds are desired as part of an investor's portfolio.

*** The SEI VP Series is used for Insurance Products.

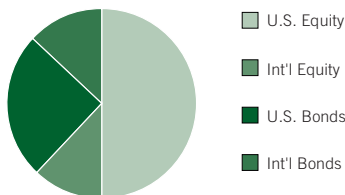
1. Institutional - includes U.S., developed international and emerging markets investments.



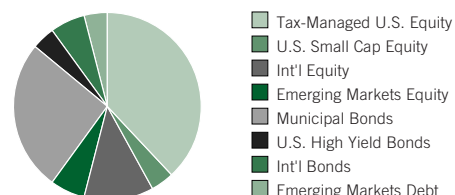
4. Tax-Sensitive Portfolios - includes SEI Tax-Managed Large Cap and SEI Tax-Managed Small Cap Funds as well as other actively managed diversified SEI mutual funds.



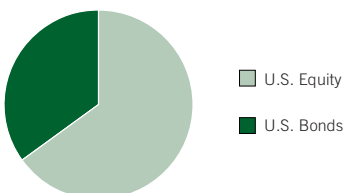
2. Global - includes U.S. and developed international investments.



5. Active Tax-Managed Portfolios - includes SEI Tax-Managed Large Cap Fund and other actively managed diversified SEI mutual funds (does not include the SEI Tax-Managed Small Cap Fund). Also available excluding emerging markets.



3. Domestic - includes U.S. only investments.



6. Tax-Managed Portfolios - includes SEI S&P 500 Fund and other actively managed SEI mutual funds. Also includes the SEI Municipal Bond Fund if fixed income exposure is chosen (does not include SEI Tax-Managed Funds or additional fixed income fund diversification).

