The Bancorp

# SEI CASH ACCESS ACCOUNT (CAA)

featuring

## CAA Checking Account

## CONVENIENCE, FLEXIBILITY, FUNCTIONALITY

—that's what the CAA Checking Account delivers for clients who want the best tools for managing their daily finances. Linked to the SEI Investment Account, the CAA Checking Account offers all the features and benefits of a premium bank account, plus access to the client's portfolio funds.

## CAA CHECKING ACCOUNT

The choice is clear.

- FDIC insured
- No minimum balance requirement
- Unlimited check-writing privileges
- Monthly sweeps to/from the account based on client balance elections
- Automatic overdraft protection for checks and Bill Pay through available funds in the linked SEI Investment Account
- Free standard checks
- ATM access with VISA® debit card
- Online Funds Transfer tool
- SEI CAA Mobile app – includes check deposit feature
- Market competitive interest rate among brokerage checking products*

## CONTACT US


Phone: 866.792.5412 (M-F 8:30 a.m.-10:00 p.m. ET)

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Web: seicashaccess.com


* Interest is currently paid on personal, trust and nonprofit business accounts.
To help maintain the security of financial information, do not include confidential personal information such as account numbers or Social Security numbers in non-secure email correspondence.


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