Discover SEI.

Delivering technology and investment solutions that connect the financial services industry

We help financial advisors and their clients achieve and sustain financial freedom together.

To provide you with a more connected experience, your financial advisor has chosen to work with SEI. Here's our story.

Who is SEI?

We deliver technology and investment solutions that connect the financial services industry.

The relationships between financial advisors and their clients are about more than just managing wealth. It's about giving you the ability to make confident decisions.

We work with your advisor to create a personalized and connected experience for you. The goal is to help you power wealth, build a sense of community, and protect your future.

With capabilities across investment processing, operations, and asset management, we work with corporations, financial institutions and professionals, and ultra-high-net-worth families to solve problems, manage change, and help protect assets.

- SEI ranked as one of the top U.S. Advisory Third-Party Managed Account Providers (Cerulli Associates, Q1 2021).
- SEI ranked as a largest outsourcer based on worldwide institutional outsourced assets under management by *Pensions* & *Investments* in June 2021. We have maintained this designation since 2011.
- SEI was recognized as a "2021 Top Workplace USA" by Energage (January 2022).

Safeguarding your assets

There is no greater responsibility than the security and safety of your assets. It helps protect futures for your family and for the next generation.

You'll receive communications from SEI Private Trust Company (SPTC), which is a wholly-owned subsidiary of SEI. SPTC maintains custody of all client assets and holds them separately, in your name. This is a different approach from a bank or brokerage firm that is able to commingle your assets with its own assets.

$1.3T

AUM/AUA

10

of the top 20 U.S. banks are clients

All data as of June 30, 2022 unless otherwise indicated.

Building brave futures.SM

From our solutions and industry reach to our talent and community impact, we've been building and delivering for more than 50 years.

Explore our history

In 1968, Chairman and CEO Alfred P. West, Jr. forms Simulated Environments Inc. and develops the first computer-based commercial credit simulator to train bank loan officers.

In the 1970s, SEI created a completely automated bank trust accounting system. Through TRUST 3000® and the SEI Wealth PlatformSM, today we have significant relationships with trust departments from 10 of the 20 largest (by asset) U.S. banks.

In 1986, SEI alum Gil Beebower co-authors "The Determinants of Portfolio Performance," a groundbreaking study that completely changed the way people think about investing.

In the 1990's, SEI led the development of a fee-based operating platform for independent advisors, aligning advisors' business interests with their clients' investment success.

SEI was also among the first companies to offer the manager-of-managers concept to both institutional and individual investors. Today, clients are served by leading specialist money managers—firms such as Neuberger Berman Investment Advisers and Lazard Asset Management—using the same sophisticated investment philosophy and process developed to serve institutional investors.

Additionally, we introduced an asset management program for corporate pension plans that enables the CFO to more fully address how pensions impact the company's financial position. Companies such as The J.M. Smucker Company and Panasonic use our asset management approach.

49

of the top 100 global investment managers are clients[1]

4,000+

employees globally

[1]As of December 31, 2021.
SEI is listed on the NASDAQ Stock Exchange as SEIC

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Helping clients face and embrace change.

We're dedicated to your success as we are to corporate clients like these:[2]

[2]Represents a partial list of current institutional clients, selected from SEI's complete client roster, all of which are global, corporate defined benefit and/or defined contribution clients, have assets over $50 million and have provided SEI with permission to use their names in marketing materials. It is not known whether the listed clients approve of SEI or the advisory services provided. The inclusion of particular clients on this list does not constitute an endorsement or recommendation of SEI's products or services by such clients. Client list as of June 30, 2022. This is a representative client list.

Information provided by SEI Investments Management Corporation.

Neither SEI nor its subsidiaries is affiliated with your advisor.

There are risks involved with investing, including loss of principal. There is no assurance goals will be met.

Investment services provided by SEI Investments Management Corporation (SIMC). Custody services provided by SEI Private Trust Company (SPTC), a federally chartered limited purpose savings association. Platform services provided by SEI Global Services, Inc. (SGS). SIMC, SPTC and SGS are wholly owned subsidiaries of SEI Investments Company (SEI).

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