

U.S. Advisor and Intermediary Support Team

An extension of your business development teams

Sales & Experience Leadership Team
Erich Holland Executive Managing Director, <i>Head of Sales & Experience</i> 610-676-3780 eholland@seic.com
Chris Arizin Managing Director, <i>North Region</i> 610-676-2833 carizin@seic.com
Anthony Peracchia Managing Director, <i>South Region</i> 610-676-2557 aperacchia@seic.com
Steven Miller, CFP® Managing Director, <i>Central Region</i> 610-676-3624 smiller@seic.com
Frank Byrd Managing Director, <i>West Region</i> 610-676-1523 fbyrd@seic.com
Gabriel Garcia Managing Director, <i>RIA Sales & Experience</i> 610-676-2075 ggarcia@seic.com
Ted Wozniak, CFA Managing Director, <i>U.S. Asset Management Distribution</i> 610-676-1956 twozniak@seic.com
Mike Matkovic Managing Director, <i>National Accounts Team</i> 610-676-2326 mmatkovic@seic.com

National Accounts Team AdvisorNationalAccountsTeam@seic.com
Mike Matkovic Managing Director, <i>National Accounts Team</i> 610-676-2326 mmatkovic@seic.com
Key Account Managers
Caitlin Charlton 610-676-2665 ccharlton@seic.com
John Duffy 610-676-2598 jduffy@seic.com
Kathleen Fox Hall 610-676-2977 kfox@seic.com
Melissa Kretschmer 610-676-4830 mkretschmer@seic.com
Internal Account Executive
Kelly Kleinschmidt 610-676-4541 kkleinschmidt@seic.com
Compliance Specialist
Sue Scott 610-676-1753 sscott@seic.com
Business Transition Services AdvisorBusinessTransitionTeam@seic.com
Chris Rice Managing Director, <i>Business Transition Team</i> 610-676-1228 crice@seic.com

We help advisors more intelligently deploy their capital to run their businesses more efficiently while serving their clients more effectively.

Our capabilities include:

Asset management

A comprehensive suite of investment strategy families that emphasizes choice, backed by the diligence of the SEI Investment Management Unit.

Advisor Technology

Flexible and integrated technology that powers both the advisor and investor experience.

Custody and operations

Custody services that focus on safety and security and operations support designed for efficiency and accountability.

Advisor Services

Actionable practice management and resources that extend your value proposition.

We deliver a comprehensive, integrated advice infrastructure that helps power wealth, build community, and protect futures for financial advisors and their clients.



Information provided by SEI Investments Management Corporation (SIMC), a wholly-owned subsidiary of SEI Investments Company (SEI). The Investment Management Unit (IMU) is a team within SIMC. There are risks involved with investing, including loss of principal. Technology services provided by SEI Global Services, Inc. (SGS). SGS is a wholly-owned subsidiary of SEI. Custody Services provided by SEI Private Trust Company (SPTC), a federally-chartered limited purpose savings association and wholly-owned subsidiary of SEI.
As of July 31, 2023.