Our history and commitment to serving advisors.

Never bought, never sold.

1983 Expands global institutional footprint to become one of the largest pension consultants in North America 1981 SEI lists on the NASDAQ (SEIC)	1992 Establishes investment advisor business	 1995 Institutional business reinvents itself as a manager of managers, combining the role of money manager, trustee, custodian, and consultant 2003 Pioneered goals-based investing research 	2019 The SEI Wealth Platform sM welcomes 7,400 independent advisors, marking the full migration of advisor business onto platform SEI Sphere [®] launches, providing managed security services that include cybersecurity, network operations, and cloud services	Ryan Hicke becomes new CEO, the first to succeed Founder and Executive Chairman, Al West. Through continued expansion, launches SEI Strategies with Dimensional. Launches a suite of four large-cap, factor-based ETFs
 1972 Launches Trust Aid – the first real time, online account system – as a solution for bank's trust departments. 1968 SEI founded by Chairman and CEO Alfred P. West, Jr. 	 1991 Helps pioneer concept and in office and cust 1989 Began offering mutual fund accounting and distribution services 1986 SEI alum Gil Beebower co-authors "Determinants of Portfolio Perfor 	troduces back Launches ody services Through a st City Nat Custom H	2012 ETF Strategies 2018 crategic partnership with ional Rochdale, launches ligh Net Worth solutions 2020 Through a strategic partnership with Capital Group®, launches SEI Strategies with American Funds®, broadening investment flexibility	 2023 Acquires Altigo, a cloud-based technology platform that provides inventory, e-subscription, and reporting capabilities for alternative investments 2021 Makes four acquisitions, including Oranj's cloud-native technology platform, providing digital collaboration tools to advisors and their clients

2022

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