

Forging the future of wealth.



Monday, October 13th

**5:00 p.m. –
8:00 p.m.**

Arrival / Optional Happy Hour at the Alloy Hotel

Join us for a welcome happy hour, where business leaders can connect with peers and SEI colleagues in a relaxed, informal setting.

Tuesday, October 14th

SEI will provide ground transportation from The Alloy to the SEI Oaks Campus starting at 7:45 a.m. The last transfer will leave at 8:15 a.m.

8:15 a.m.

Breakfast, Wetlands Patio

9:00 a.m.

Event welcome & kick-off, Amphitheater

9:15 a.m.

Forging the future of wealth with SEI, Amphitheater

Start the day off with Sanjay Sharma (EVP, CEO of SEI International, and Global Head of SEI's Private Banking business), Allie Carey (Global Head of Strategy for SEI Private Banking & Wealth Management), and Zach Womack (Chief Technology Officer, SEI) as they give an overview of our strategy for SEI and our platforms.

10:05 a.m.

Digital workflows*, Amphitheater

Set to launch in Q4 2025, our digital workflows service transforms traditionally complex and time-consuming processes. Join our subject matter expert John Petrei (Information Delivery Director, SEI) to learn about this new service and SEI's longer term vision.

Alternative asset strategy*, New Delhi

Learn about SEI's alternative investment ecosystem and how we are enabling alternatives access through the SEI Wealth PlatformSM from Brandon Bates (Solutions Director, SEI), Kevin Crowe (SVP and Head of SEI AccessTM Platform), Chintan Kothari (Product Solutions Manager, SEI), and Alan Benson (Custody & Integration Services Director, SEI).

Tax management strategy*, Sydney

Join Arthur Worthington (Senior Director Business Development & Integration, SEI LifeYield) to learn about SEI LifeYield and our approach to a unified managed household approach to tax management and optimization.

*This session will be repeated on Wednesday.

11:15 a.m. AI strategy update, Amphitheater

Delve into SEI's AI strategy across the enterprise, highlighting updates for 2025, the applications currently in use and those being explored for the future.

Innovation and ventures strategy, New Delhi

Innovation is most effective when it is a shared experience. In this session, you'll hear from Alex Cochand (SEI Next) about our key areas of focus and our ventures strategy moving forward.

12:00 p.m. Lunch, Wetlands Patio

1:00 p.m. Keynote speaker, Amphitheater

Hear from our keynote speaker, Juan Bendana, on building unwavering confidence to show up as your best both personally and professionally.

2:05 p.m. Data cloud, Amphitheater

Explore real client success stories that demonstrate the powerful impact of the SEI Data Cloud with our subject matter experts. Learn how this solution is enabling firms to harness and integrate data from various sources to unlock new insights and opportunities.

TIFIN, New Delhi

Hear from Todd Cooper (Chief Revenue Officer, TIFIN AG) about supervised AI and machine learning in the wealth management space and how their AI-driven solutions can enable organic growth for wealth management firms. Hear from Greg Murray (Chief Revenue Officer, TIFIN Give) on how they leverage data-driven insights into their cutting-edge philanthropic platform that reimagines charitable giving by integrating it into wealth management.

CliftonStrengths®, Sydney

Join SEI's experts for an exclusive, limited-registration event where they will review and share insights into your unique strengths using the Gallup® CliftonStrengths® StrengthsFinder program. Gain valuable perspectives to enhance your personal and professional growth.

3:05 p.m. SWP PSI 49 overview, Amphitheater

Get an inside look at the key features in the upcoming SWP PSI 49 release. Discover what's new and how these enhancements can benefit your firm.

Trust 3000 roadmap, Sydney

Explore the TRUST 3000 roadmap and its major updates. Learn about the upcoming advancements and how they can enhance your firm's capabilities.

Professional services, New Delhi

We'll explore SEI's Professional Services program, highlighting how our tailored solutions and expertise support Private Banking and Wealth Management clients. Through real-world use cases, you'll see how services like system integration, application development, and organizational change management drive client success and growth.

4:00 p.m. Day one closing, Amphitheater

SEI will provide ground transportation from the SEI Oaks campus to The Alloy following the conclusion of Day 1. The last transfer will leave at 5:00 p.m.

Evening Reception at Terrian Café

We'll wrap up the first day of the conference with a relaxed evening at Terrain Gardens in Devon. Expect a warm, rustic-chic setting, seasonal bites, a delicious dinner, and a surprise or two. It's the perfect way to connect and recharge.

Ground transportation will be provided by SEI to Terrian Café from The Alloy beginning at 5:30 p.m.

The last transfer will depart The Alloy at 5:45 p.m.

Wednesday, October 15th

SEI will provide ground transportation from The Alloy to the SEI Oaks Campus starting at 7:30 a.m.

The last transfer will leave at 8:00 a.m.

Please plan to check out of the hotel and bring your luggage with you to SEI.

8:00 a.m. Breakfast, Wetlands Patio

8:45 a.m. Day 2 welcome

9:00 a.m. Ask Ryan Hicke, CEO, SEI, Amphitheater

10:05 a.m. Digital workflows, Sydney

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Alternative asset strategy, New Delhi

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Tax management strategy, Amphitheater

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11:15 a.m. Professional services – Interest gathering session, New Delhi

Join Deen Bandhu (Head of SEI Professional Services and Data Cloud) for an interactive session to learn more about new Professional Services solutions we're exploring such as Business Process Outsourcing and Trust Administration as a Service. This session gives you the opportunity to provide feedback in real-time.

SEI Private Trust Company (SPTC) update, Amphitheater

Hear from SPTC's President, Linda Scavone as she dives into the goals and future strategy shaping our operational direction. This session will provide valuable insight into the vision guiding SPTC forward.

Wellness in the workplace, Sydney

Wellness is an enterprise-wide strategic initiative to empower SEI's global workforce by creating an environment that supports their physical, mental, and emotional well-being. Learn more from experts on our Wellness team in this engaging session and how you may be able to leverage learnings within your own organization

12:00 p.m. Lunch, Wetlands Patio

1:05 p.m. Open networking, Amphitheater Foyer

Use this time to network with other clients you've gotten to know during your time at the Innovation Community Forum

Product & solution showcase, Amphitheater Foyer

Explore a variety of SEI products and solutions in this showcase session, designed to give clients an opportunity for deeper, more personalized discussions. Whether you have follow-up questions or want to learn about something you missed earlier in the week, this is your chance to engage directly with our experts.

Meet and greet service teams, Amphitheater Foyer

Spend some time with your Operations, Support and/or Service Teams, including Client Service, SPTC, and Support Partners.

Data center tour, Amphitheater Foyer

Join us for a comprehensive data center tour designed specifically for clients who need to fulfill regulatory requirements. This tour will provide an in-depth look at our facilities and security measures, ensuring compliance and transparency.

Transportation will depart the SEI Oaks campus to Philadelphia International Airport or Amtrak 30th Street Station at the conclusion of the Forum. The last transfer will depart SEI at 2:30 p.m.

We will also have a 2:30 p.m. transfer returning to the Alloy for those extending their stay.