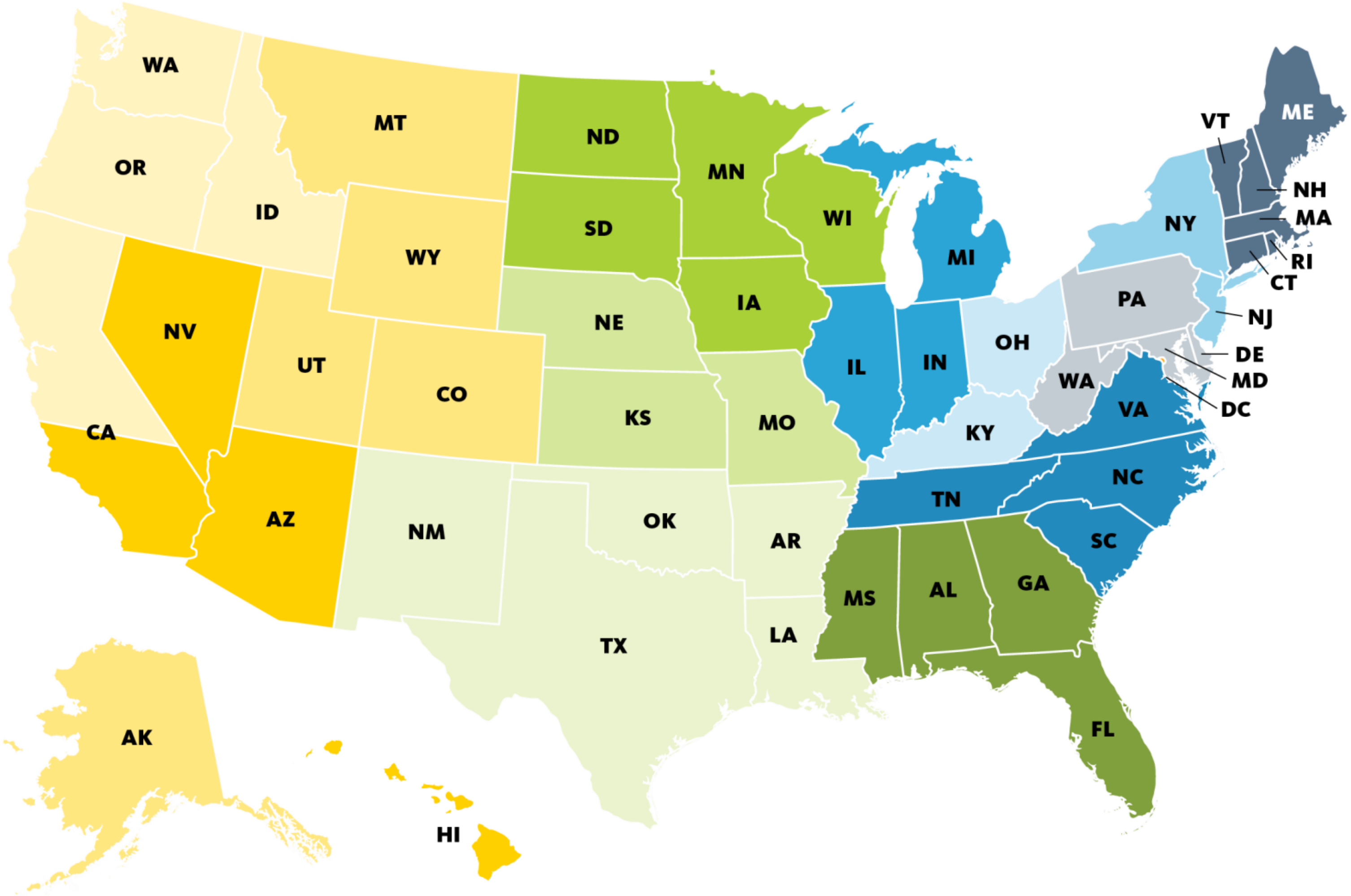
Independent Broker/Dealer-affiliated advisors

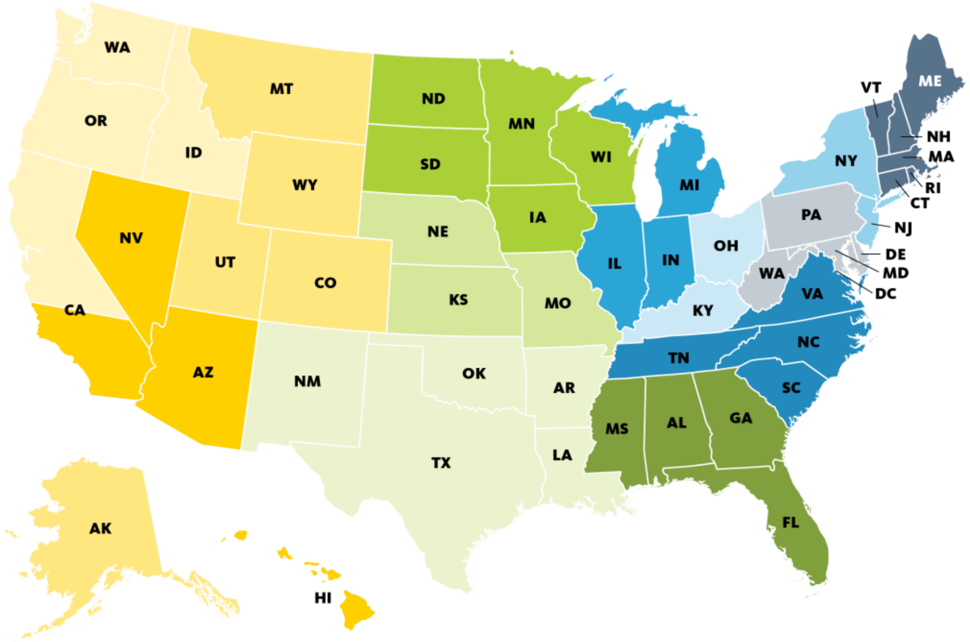
Regions, territories and dedicated business development teams.



As of January 1, 2026.

Independent Broker/Dealer-affiliated advisors

Regions, territories and dedicated business development teams.



		New Client Team	Existing Client Teams	
Region	**Territory States**	**Business Development Director**	**Senior Relationship Manager**	**Relationship Manager**
East	CT, MA, ME, NH, RI, VT	**Ben Packer** 610-676-2391 bpacker@seic.com	**Geoff Knox** 610-676-2529 gknox@seic.com	**Tim Heagy** 610-676-3532 theagy@seic.com
	NJ, NY	**John Loughlin** 610-676-3650 jloughlin@seic.com	**Bill Berberich, CFP®** 610-676-2468 wberberich@seic.com	
	NC, SC, TN, VA	**Greg Painter, AIF®** 610-676-3539 gpainter@seic.com	**Tom Pileggi** 610-676-3301 tpileggi@seic.com **Andrew Roth covers IL*	
	IL*, IN, MI	**Jake Norton** 610-676-2099 jxnorton@seic.com		**Jake Flannery** 610-676-4903 jflannery@seic.com **Sam Stroud covers IL*
	KY, OH	**Connor Millay** 610-676-5178 cmillay@seic.com		
	DC, DE, MD, PA, WV	**Alex DeCiantis, CFP®** 610-676-5406 adeciantis@seic.com	**Andrew Chipego** 610-676-4516 achipego@seic.com	
West	IA, MN, ND, SD, WI	**Tyler Magie, CIMA®** 501-652-0368 tmagie@seic.com	**Andrew Roth** 610-676-4898 aroth@seic.com **Also covers IL*	**Sam Stroud** 610-676-7969 sstroud@seic.com **Also covers IL*
	KS, MO, NE	**Nate Poole** 610-676-4607 npoole@seic.com		
	AR, LA, OK, NM, TX	**Tyler Cashiola** 610-676-5571 tcashiola@seic.com		
	AL, FL, GA, MS*	**Shedrick Crawford** 610-676-4678 scrawford@seic.com	**Brian Barone** 610-676-4600 bbarone@seic.com	**Austin Paxton** 610-676-3116 apaxton@seic.com **Tatiana Paravela covers CA*
	AK, CO, MT, UT, WY	**Tigran Muradyan** 303-358-5858 tmuradyan@seic.com	**Luke Arizin** 610-676-3914 larizin@seic.com **Rob Kelly covers CA*	
	CA (North)*, ID, OR, WA	OPEN		
	CA (South), AZ, HI, NV, GU	**Jim Agasar, BFA™** 215-801-2273 jagasar@seic.com	**Rob Kelly, CFP®** 610-676-4515 rjkelly@seic.com **Also covers CA (North)*	**Tatiana Paravela** 610-676-3497 tparavela@seic.com **Also covers CA (North)*

As of January 1, 2026.

Independent Broker/Dealer-affiliated advisors

Regions, territories and dedicated business development teams.

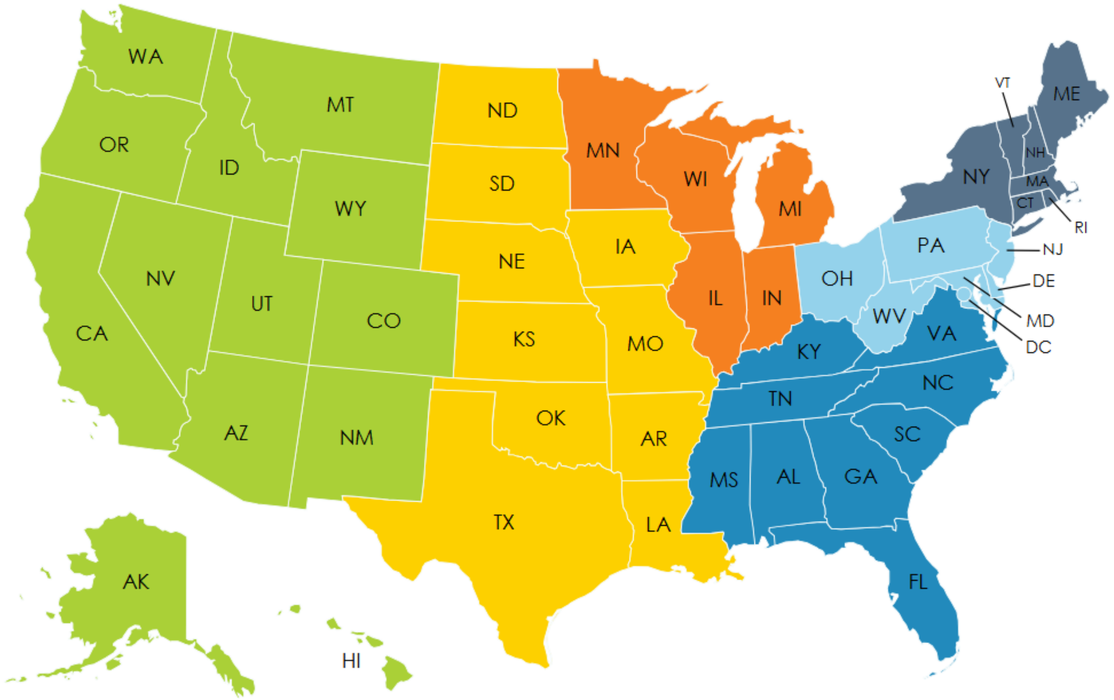
		New Client Team		Existing Client Teams		
Region	**Territory States**	**Business Development Director**	**Account Executive**	**Senior Relationship Manager**	**Account Executive**	**Relationship Manager**
East	CT, MA, ME, NH, RI, VT	**Ben Packer** 610-676-2391 bpacker@seic.com	**Paul Kokol** 610-676-4819 pkokol1@seic.com	**Geoff Knox** 610-676-2529 gknox@seic.com	**Matt Pesot** 610-676-2926 mpesot@seic.com	**Tim Heagy** 610-676-3532 theagy@seic.com
	NJ, NY	**John Loughlin** 610-676-3650 jloughlin@seic.com	**Parker Wine** 610-676-2741 pwine@seic.com	**Bill Berberich, CFP®** 610-676-2468 wberberich@seic.com	**Madeline Russell** 610-676-4945 mrussell1@seic.com	
	NC, SC, TN, VA	**Greg Painter, AIF®** 610-676-3539 gpainter@seic.com	**J.T. Spina** 610-676-3118 jspina@seic.com	**Tom Pileggi** 610-676-3301 tpileggi@seic.com **Andrew Roth covers IL*	**Ryan Cavanagh** 610-676-7312 rcavanagh1@seic.com	
	IL*, IN, MI	**Jake Norton** 610-676-2099 jxnorton@seic.com	**Keith Carra** 610-676-3668 kcarra1@seic.com			**Jake Flannery** 610-676-4903 jflannery@seic.com **Sam Stroud covers IL*
	KY, OH	**Connor Millay** 610-676-5178 cmillay@seic.com	**Kristin Conlon** 610-676-5123 kconlon@seic.com			
	DC, DE, MD, PA, WV	**Alex DeCiantis, CFP®** 610-676-5406 adeciantis@seic.com	**Adam Booz** 610-676-2331 abooz@seic.com	**Andrew Chipego** 610-676-4516 achipego@seic.com	**Alex Cohen** 610-676-1057 acohen@seic.com	
West	IA, MN, ND, SD, WI	**Tyler Magie, CIMA®** 501-652-0368 tmagie@seic.com	**Hayden Greer** 610-676-4837 hgreer@seic.com	**Andrew Roth** 610-676-4898 aroth@seic.com **Also covers IL*	**Andrew Humphrey** 610-676-2550 ahumphrey@seic.com	**Sam Stroud** 610-676-7969 sstroud@seic.com **Also covers IL*
	KS, MO, NE	**Nate Poole** 610-676-4607 npoole@seic.com				
	AR, LA, OK, NM, TX	**Tyler Cashiola** 610-676-5571 tcashiola@seic.com	**Brendan Smith** 610-676-3036 bsmith3@seic.com		**Zachary Button** 610-676-1412 zbutton@seic.com	
	AL, FL, GA, MS	**Shedrick Crawford** 610-676-4678 scrawford@seic.com	**Joe De Los Santos Morris** 610-676-5445 jdelossantosmorris@seic.com	**Brian Barone** 610-676-4600 bbarone@seic.com	**Nick Hoffman** 610-676-5488 nhoffman@seic.com	**Austin Paxton** 610-676-3116 apaxton@seic.com **Tatiana Paravela covers CA*
	AK, CO, MT, UT, WY	**Tigran Muradyan** 303-358-5858 tmuradyan@seic.com	**Nick Marchegiano** 610-676-5271 nmarchegiano@seic.com	**Luke Arizin** 610-676-3914 larizin@seic.com **Rob Kelly covers CA*	**Joe McLaughlin** 610-676-4804 jmclaughlin@seic.com	
	CA (North)*, ID, OR, WA	**OPEN**	**James Toner** 610-676-3596 jtoner@seic.com			
	CA (South), AZ, HI, NV, GU	**Jim Agasar, BFA™** 215-801-2273 jagasar@seic.com	**OPEN**	**Rob Kelly, CFP®** 610-676-4515 rjkelly@seic.com **Also covers CA (North)*	**Gabe Goforth** 610-676-4077 ggoforth@seic.com	**Tatiana Paravela** 610-676-3497 tparavela@seic.com **Also covers CA (North)*

As of January 1, 2026.

Independent RIAs and Hybrid RIAs

Regions, territories and dedicated teams: New Client Team.

Leadership Team	
Gabriel Garcia Managing Director, Head of RIA Channel *RIA Strategy & Client Experience* 610-676-2075 | ggarcia@seic.com	**Harley Nager, CFP®** Managing Director *RIA Strategy & Client Experience* 610-676-2036 | hnager@seic.com



		New Client Team: RIA	
Territory	**States**	**Business Development Director**	**Client Experience Associate**
Northeast RIA	**CT, MA, ME, NH, NY, RI, VT**	**OPEN**	**Patrick Troy** 610-676-7597 ptroy1@seic.com
Mid-Atlantic RIA	**DC, DE, MD, NJ, OH, PA, WV**	**Eric Dunn** 610-676-3434 edunn@seic.com	**Brendan Mallon** 610-676-3450 bmallon@seic.com
Southeast RIA	**AL, FL, GA, KY, MS, NC, PR, SC, TN, VA**	**Kevin Brandenburg** 610-676-2013 kbrandenburg@seic.com	**Bobby Jones** 610-676-1091 rjones1@seic.com
Great Lakes RIA	**IL, IN, MI, MN, WI**	**Mark Mizzer, CFP®** 610-676-4209 mmizzer@seic.com	**Thomas Kutufaris** 610-676-5242 tkutufaris@seic.com
Central RIA	**AR, IA, KS, LA, MO, ND, NE, OK, SD, TX**	**Fran Sedgwick** 610-676-4403 fsedgwick@seic.com	**Thomas Kutufaris** 610-676-5242 tkutufaris@seic.com
West RIA	**AK, AZ, CA, CO, HI, ID, MT, NV, NM, OR, UT, WA, WY**	**Clayton Johnson** 702-306-7277 cjohnson1@seic.com	**Bobby Jones** 610-676-1091 rjones1@seic.com
Andrew Quintois, *Client Implementation Specialist* 610-676-2113 | aquintois@seic.com			

As of January 1, 2026.

Independent RIAs and Hybrid RIAs

Regions, territories and dedicated teams: Strategic Client Team.

Leadership Team	
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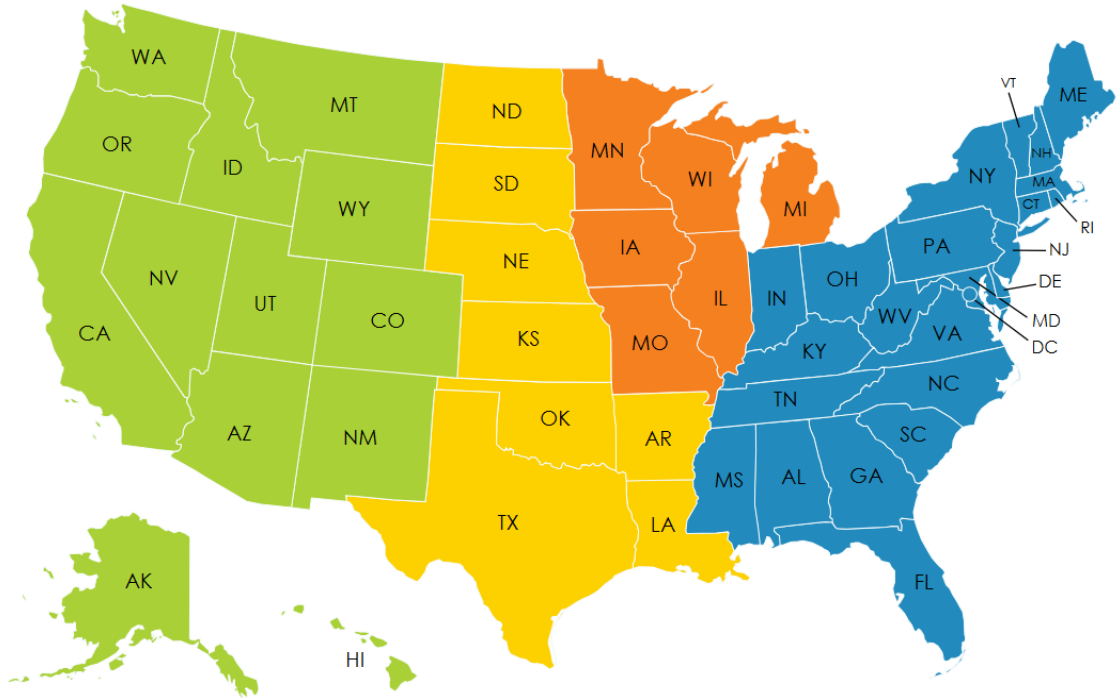

		Strategic Client Team: RIA	
Territory	**States**	**Senior Relationship Manager**	**Client Experience Associate**
East RIA	**AL, CT, DC, DE, FL, GA, IN, KY, MA, MD, ME, MS, NH, NC, NJ, NY, OH, PA, PR, SC, TN, VA, WV**	**Thomas Murray** 610-676-3631 tmurray@seic.com	**Ryan Bivenour** 610-676-5515 rbivenour@seic.com
Great Lakes RIA	**IA, IL, MI, MN, MO, WI**	**Michael Harris, JD, MBA, CFP®** 610-676-4978 mjharris@seic.com	**Larissa Noble** 610-676-1589 lnoble@seic.com
Central RIA	**AR, KS, LA, ND, NE, OK, SD, TX**	**Jim Faunce** 610-676-3179 jfaunce@seic.com	**Natasha Patel** 610-676-3135 npatel2@seic.com
West RIA	**AK, AZ, CA, CO, HI, ID, MT, NV, NM, OR, UT, WA, WY**	**Michelle Rohrbach** 610-676-2608 mrohrbach@seic.com	**Eric Martinez** 610-676-4108 emartinez@seic.com
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As of January 1, 2026.

U.S. Wealth and Advisor Client Team

An extension of your business development teams.

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We simplify the complex to elevate advice and empower investors.

Our capabilities include:

Flexible investment solutions
Benefit from in-house expertise combined with premier asset managers to help you deliver personalized investment solutions at scale.

Powerful technology
Leverage a unified platform that power some of the industry's largest banks and institutions.

Integrated custody
It isn't just a component of our platform—it's the built-in foundation that powers everything we do.

Actionable advisor services
Elevate your firm with actionable practice management and learn how to think like a business consultant.

Provide an integrated technology, custody, and investment infrastructure designed to help you scale your business and focus on your clients.