

SEI Access for Collective Investment Trusts (CITs).

A modern, digital onboarding experience for the retirement ecosystem

Overview.

SEI Access™ for CITs is among the first solutions in the market to deliver a fully digitized, end-to-end onboarding experience for collective investment trusts.

Designed for plan sponsors, advisors, and recordkeepers, our platform streamlines CIT participation agreements with intelligent automation, centralized workflows, and real-time visibility. As CIT adoption continues to grow, SEI Access for CITs removes onboarding friction that can slow implementation—making CITs easier to bring to market and easier to scale.

Key features.



Digitized agreements

Eliminates paper-based documentation through digital review, approval, and execution.



Centralized dashboards

Delivers a centralized view of onboarding progress, next steps, and ownership.



Customized workflows

Accommodates both 3(21) and 3(38) Advisory Agreement relationships.



Real-time notifications

Ensures stakeholders remain aligned, informed, and engaged throughout onboarding.



Intelligent automation

Pre-populates onboarding data using Department of Labor Form 5500 information to reduce errors and manual entry.



Purpose-built infrastructure

Designed specifically around CIT onboarding and participation agreement workflows.

SEI Access for CITs.

Benefits.



Enhanced user experience

Move through a streamlined onboarding journey that delivers real-time progress, defined next steps, and transparent ownership—simplifying and centralizing the application process.



Accelerated onboarding

Successfully complete the application process in minutes, reducing delays traditionally caused by manual review, rework, and unclear handoffs.



Built to scale

Leverage SEI's integrated CIT technology, which supports governance, operations, and digital onboarding, and provides streamlined opportunities to expand business.

Learn more about how SEI Access for CITs can simplify onboarding and reduce operational friction at scale.

Register for SEI Access™ for CITs →

Schedule a demo with our team →

For more information, please visit our [website](#).

Questions? [Email us](#) or call 610-676-2369, Option 3.

ABOUT SEI'S INVESTMENT MANAGERS BUSINESS

SEI's Investment Managers business provides advanced operating infrastructure for investment organizations of all types to evolve and compete in a landscape of escalating business challenges. SEI's global operating platform delivers customized and integrated capabilities across a wide range of investment vehicles, strategies, and jurisdictions to investment managers and asset owners. The company's services enable users to gain scale and efficiency, keep pace with marketplace demands, and run their businesses more strategically. For more information, visit seic.com/ims.



seic.com

ABOUT SEI

SEI® (NASDAQ:SEIC) is a leading global provider of financial technology, operations, and asset management services within the financial services industry. SEI tailors its solutions and services to help clients more effectively deploy their capital—whether that's money, time, or talent—so they can better serve their clients and achieve their growth objectives.

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