March 3, 2025

SEI Launches Alternative Investment Product Marketplace, Expands Access to Private Markets

SEI Access to Offer Wealth Managers and Advisors a Digital, Public Market Experience for Private Markets

OAKS, Pa., March 3, 2025 /PRNewswire/ -- SEI® (NASDAQ:SEIC) today announced the launch of its alternative investment product marketplace through SEI Access™, its enhanced platform designed to provide an end-to-end investment experience and increased access for wealth managers and financial advisors. SEI Access is broadly available to all registered investment advisors, wealth managers, and broker-dealers in the U.S., subject to applicable eligibility and regulatory requirements.

As the investor demand for personalization and investment choice soars, advisors, wealth managers, and fund managers continue to focus on alternative investments. SEI Access' advisor-centric approach offers wider access to alternative investment products across a variety of asset classes and fund managers, including recent additions Constitution Capital Partners, Golub, Neuberger Berman, OpenVC, StepStone Group (Nasdaq: STEP), and Tall Trees Capital Management, as well as long-time subscription automation technology clients Cantor Fitzgerald, Capital Square, and InvestX.

A true end-to-end solution, SEI Access features:

- An intuitively designed **digital marketplace** and **education forum**, where advisors can evaluate funds and make informed decisions using consistent, easy-to-compare fund attributes
- **Integrated subscription processing** capabilities, enabling execution and investment management directly from the marketplace using the platform's smart workflow that combines electronic subscription documents, proprietary firm paperwork, custodian forms, and e-signature tools to help ensure fast and accurate transaction processing
- Value for fund managers with **expanded distribution opportunities**—as a top-five administrator of U.S. private assets[1]—across a wide network of independent wealth managers, accelerated subscription-to-funding via paperless processing, and simplified workflows to increase adoption and engagement among advisors

Kevin Crowe, Senior Vice President and Head of SEI Access, said:

"Access to alternative investment products remains largely exclusive to institutions and high-net-worth investors—and challenges with disclosures, fee structures, valuations, reporting, and manual processes persist. SEI Access not only provides automated processing power, but it will deliver wider access to in-demand alternative investments, increased transparency, and robust educational tools to help advisors make confident, personalized financial decisions that align with their clients' wealth goals.

"The breadth of SEI's capabilities across technology, operations, and asset management—coupled with the breadth of the markets we serve—enables us to connect the industry in ways that others cannot. The introduction of SEI Access further underpins SEI as a premier alternatives ecosystem."

SEI Access builds upon SEI's deep private markets expertise and acquisition of Altigo, a subscription automation technology that powers native transaction processing. The company is committed to making strategic investments in innovative technologies that provide clients enhanced capabilities and solutions that drive growth. SEI reinforced this commitment with its recent announcement of the acquisition of LifeYield, positioning the company to be the first in the industry to deliver real-time, automated unified managed household (UMH) capabilities in a cost-effective, fully bundled overlay solution.

As of Dec. 31, 2024, SEI Access supports more than 250 wealth management firms and 165 fund managers, providing access to approximately 300 alternative investment funds. With more than 22,500 subscriptions, the platform has processed approximately $4.9 billion in alternatives transactions.[1]

[1]AUA rankings based on Convergence "Administrator Market Segment by Fund Assets" data as of Nov. 30, 2024.

About SEI®
SEI (NASDAQ:SEIC) delivers technology and investment solutions that connect the financial services industry. With capabilities across investment processing, operations, and asset management, SEI works with corporations, financial institutions and professionals, and ultra-high-net-worth families to help drive growth, make confident decisions, and protect futures. As of Dec. 31, 2024, SEI manages, advises, or administers approximately $1.6 trillion in assets. For more information, visit seic.com.

About SEI Access™
SEI Access™ is an end-to-end alternatives platform designed to improve the product selection and investment experience for registered investment advisors, broker-dealers, and their clients. Alternative investment fund managers use the end-to-end service to access a wider distribution network and manage the subscription process more easily. The platform's smart workflow combines electronic subscription documents, proprietary firm paperwork, custodian forms, and e-signature capabilities to help ensure fast and accurate transaction processing. As of Dec. 31, 2024, SEI Access has processed more than $4.9 billion in alternatives transactions.

Forward-looking statements

This release contains forward-looking statements within the meaning or the rules and regulations of the Securities and Exchange Commission. In some cases, you can identify forward-looking statements by terminology, such as "may," "will," "expect," "believe" and "continue" or "appear." Our forward-looking statements include our current expectations as to:

- the demand for and focus on alternative investment products, and
- the benefits and/or advantages of our products and services.

You should not place undue reliance on our forward-looking statements, as they are based on the current beliefs and expectations of our management and subject to significant risks and uncertainties, many of which are beyond our control or are subject to change. Although we believe the assumptions upon which we base our forward-looking statements are reasonable, they could be inaccurate. Some of the risks and important factors that could cause actual results to differ from those described in our forward-looking statements can be found in the "Risk Factors" section of our Annual Report on Form 10-K for the year ended Dec. 31, 2024, filed with the Securities and Exchange Commission.

Company Contact:	**Media Contact:**
Emily Baldwin	Kerry Mullen
SEI	Vested
+1 610-676-3262	+1 917-765-8720
ebaldwin@seic.com	kerry@fullyvested.com

View original content:https://www.prnewswire.com/news-releases/sei-launches-alternative-investment-product-marketplace-expands-access-to-private-markets-302389105.html

SOURCE SEI Investments Company