

May 6, 2021



SEI Wins in "Outsourcing/Business Process Outsourcing" at Family Wealth Report Awards 2021

Recognition Highlights Superior Technology, Dependable Workflow Processes and Consultative Expertise

OAKS, Pa., May 6, 2021 /PRNewswire/ -- SEI (NASDAQ: SEIC) today announced it has won the *Family Wealth Report Awards* "Outsourcing/Business Process Outsourcing" category for the second consecutive year. SEI received this year's recognition for its suite of end-to-end outsourced solutions, including the SEI Wealth PlatformSM and Archway PlatformSM, designed to meet the unique needs of wealth managers, family offices and the institutions who serve them. It also marks the eighth consecutive year that SEI was independently recognized by its peers on the *Family Wealth Report Awards* judging panel.

"We're honored to receive this recognition again from the *Family Wealth Report*, especially in a year of significant change and turmoil. The pandemic reinforced the importance of partnering with service organizations that are dependable, agile and resilient, but also with those providing a true depth of solutions, experience and people," said Steve Meyer, Head of SEI's Global Wealth Management Services. "We know that firms who decide to outsource a part of their business require a certain level of initial trust and ongoing commitment. We take providing both very seriously. The deep and lasting connections that we have spent years developing—with each other, our clients and industry partners—have been a meaningful driver of our joint resilience and success in good times and bad. We are indebted to our teams at SEI for relentlessly delivering on our commitment to provide high-quality service and world-class, client-driven, tech-forward solutions."

With more than 50 years in business and over 30 years providing business process outsourcing services, SEI is the first company to consistently own the core technology and employ the people and services to run the back-office operations on behalf of wealth management clients. This award highlights SEI's ability to leverage its vast resources and solutions globally, creating an ecosystem of technologies and services across the front, middle and back office that can be expertly curated to meet clients' evolving, complex and growing demands.

"In today's digital-first world, flexibility, adaptability and personalization are key—not just across operations and technology, but also across the talent pool. Integration across both is critical for leveraging technology as an enabler to allow clients to focus on growing their businesses, servicing their end-clients and looking to the future." said Meyer. "By modularizing our platforms, coupled with significant expertise, we are able to deliver the right solution at the right time and in the right manner, helping our clients—and theirs—face and embrace change. This was particularly invaluable in 2020, when remote working, collaboration and workforce models came under immense pressure."

By integrating people, processes and technology, the SEI Wealth Platform provides wealth managers with the technology infrastructure and human capital to support their strategic objectives, even in times of change. SEI's Archway Platform leverages a highly configurable combination of technology and service to support key wealth management operations—including accounting, investment data aggregation and financial reporting functions—to help family offices and advisors to wealthy families better serve their ultra-high-net-worth clients.

The SEI Wealth Platform and the Archway Platform are part of SEI's Global Wealth Management Services (GWMS) business, comprised of market-leading, innovative solutions designed to support the future growth of investment and wealth managers globally. Collectively, as of March 31, 2021, GWMS has trusted relationships with over 625 wealth managers, family offices and investment managers globally.

About the SEI Wealth PlatformSM

The SEI Wealth Platform (the Platform) is an outsourcing solution for wealth managers encompassing wealth processing services and wealth management programs, combined with business process expertise. With the Platform, SEI provides wealth management organizations with the infrastructure, operations, and administrative support necessary to capitalize on their strategic objectives in a constantly shifting market. The SEI Wealth Platform supports trading and transactions on 131 stock exchanges in 41 countries and 43 currencies, through the use of straight-through processing and a single operating infrastructure environment. For more information, visit: seic.com/wealthplatform

About SEI Family Office Services

SEI Family Office Services delivers technology and outsourced services that support the accounting, investment management and reporting functions of family offices, private banks, private wealth advisors and alternative asset managers. Designed to help family offices and advisors to wealthy families better serve their ultra-high-net-worth clients, SEI's award-winning Archway PlatformSM and high-touch outsourced services efficiently handle complex partnership, portfolio and corporate accounting alongside bill payment, investment management and multi-asset class data aggregation. As of March 31, 2021, SEI Family Office Services has \$450 billion in assets on platform.¹ For more information, visit seic.com/archway.

¹Assets on platform is not indicative of potential revenue.

About SEI

After 50 years in business, SEI (NASDAQ:SEIC) remains a leading global provider of investment processing, investment management, and investment operations solutions designed to help corporations, financial institutions, financial advisors, and ultra-high-net-worth families create and manage wealth. As of March 31, 2021, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages, advises or

administers approximately \$1 trillion in hedge, private equity, mutual fund and pooled or separately managed assets, including approximately \$384 billion in assets under management and \$836 billion in client assets under administration.

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