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SEI Selects Canoe Intelligence to Power Alternative Investment Data Management

SEI Family Office Services and Canoe Intelligence Strengthen Long-standing Relationship with Enhanced Document and Data Management Technology for Alternative Investments

OAKS, Pa., Nov. 21, 2022 /PRNewswire/ -- SEI® (NASDAQ:SEIC) today announced an expanded strategic partnership with [Canoe Intelligence \("Canoe"\)](#), the financial technology company powering alternative investment intelligence, to automate and bring new efficiencies to the alternative investment document and data workflows within SEI's Archway PlatformSM. The Archway Platform is delivered by [SEI Family Office Services](#), a leading provider of technology and technology-enabled service offerings to family offices, financial institutions, and the ultra-high-net-worth clients they serve.

SEI Family Office Services will leverage Canoe's industry-leading alternatives document collection and data extraction technologies for their outsourced service clients, enhancing SEI Family Office Services' ability to scale its operations and deliver exceptional value to their end-clients who invest in alternative assets. Since 2020, Canoe and SEI Family Office Services have [worked together](#) to deliver alternative investment data more accurately and efficiently from Canoe to the Archway Platform for mutual clients. This integration has empowered users of both systems to seamlessly input, track, and report on alternative investment data as a part of their holistic wealth picture.

Ryan Laughon, Head of SEI Family Office Services, said:

"SEI Family Office Services has a long history of servicing clients with significant allocations toward alternative investments. With an eye on improving the efficiency and automation of tracking these types of investments, we have prioritized building connectivity between the Archway Platform and complementary technologies like Canoe that provide value for our user community. We're thrilled to expand our relationship with Canoe and create new efficiencies for our teams who service clients that invest in alternative assets."

Michael Muniz, Partner and Chief Revenue Officer at Canoe Intelligence, said:

"We're excited to grow our relationship with SEI to continue to drive innovation in the alternatives space. This next step will help arm the SEI team with the technology to automate alternatives document collection and data extraction, freeing up more time to focus on client service and other value-add initiatives. Our team has very much appreciated SEI's

partnership over the years. As our strategic relationship expands, we support both SEI's clients in achieving new operational efficiencies and the SEI Family Office Services team in transforming their internal processes to support long-term scalability and client satisfaction. Together, we're looking forward to continuing to raise the bar for the growing alternative investment community."

Canoe recently participated in SEI's exclusive family office client conference, IMMERSION, where they showcased Canoe's capabilities through live demonstrations and an intimate fireside chat with existing Canoe and SEI clients. Canoe's recent accomplishments include building traction as the [industry-standard solution for alternatives document and data management](#), expanding relationships with other wealth management technology providers, and numerous [client engagements](#) with institutional investors and large family offices.

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 solve problems, manage change and help protect assets—for growth today and in the future. As of Sept. 30, 2022, SEI manages, advises, or administers approximately \$1.2 trillion in assets. For more information, visit seic.com.

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 Sept. 30, 2022, SEI Family Office Services has \$547 billion in assets on platform. For more information, visit seic.com/archway.

About Canoe Intelligence

Canoe Intelligence redefines alternative investment data processes for hundreds of leading institutional investors, capital allocators, asset servicing firms and wealth managers. By combining industry expertise with the most sophisticated data capture technologies, Canoe's technology automates the highly-frustrating, time-consuming, and costly manual workflows related to alternative investment document and data management, extraction and delivery. With Canoe, clients can refocus capital and human resources on business performance and growth, increase efficiency, and gain deeper access to their data. Canoe's AI-driven platform was developed in 2013 for Portage Partners LLC, a private investment firm. Learn more: www.canoeintelligence.com

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