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Diversified Celebrates Major Milestone with SEI

Deepened Relationship Highlights Continued Stability, Supports Acquisitions, and Powers Growth

OAKS, Pa., Sept. 12, 2024 /PRNewswire/ -- SEI® (NASDAQ:SEIC) today announced that Diversified, LLC (Diversified) celebrated a major growth milestone, surpassing $2 billion in client assets under management (AUM) as of June 30, 2024. Diversified leverages SEI as a strategic partner across technology, operations, and asset management, reinforcing SEI's commitment to serving the RIA community.

SEI also played an important strategic role in supporting Diversified's most recent acquisitions, growing their presence to include offices in Georgia and Massachusetts. Led by President Andrew Rosen, CFP®, CEP® and CEO Michael Fisher, CFP®, Diversified is based in Wilmington, DE with offices in Wayne, PA, Birmingham, AL, Alpharetta, GA, Cape Cod, MA, and Northampton, MA.

Serving approximately 2,000 client households with approximately $2 billion in total AUM, Diversified provides comprehensive financial planning with the mission to bring true happiness to as many people as possible by providing individuals and families with everything needed to "Experience Lifelong Wealth." The firm's financial advisors have embraced the breadth of SEI's capabilities to better serve their clients, including SEI Private Trust Company's client asset custody structure, integrated advisor and investor technology, SEI's suite of investment strategies, and a dedicated service model.

Commenting on Diversified's continued growth, Rosen said:

"As we focus on growing and scaling our business for the future, the seamless integration of SEI's technology and custody solutions, as well as the stability, optionality, and community that SEI provides, continue to make a difference. We do what we do to make our clients' lives easier, save them time, and redirect their efforts to the things they love, and SEI delivers those same benefits for our business.

"We're fortunate to serve the individuals and families that we do and advising more than $2 billion is a testament to our entire team of financial planners, investment and client experience specialists, and more. We chose SEI as a strategic partner years ago, and our decision is validated on a nearly daily basis. SEI's team is simply an extension of us—and coupled with the breadth of the company's capabilities, they're a key accelerant to our growth."

Highlighting the benefits of the strategic partnership, Erich Holland, Executive Managing Director of Client Experience for SEI's Advisor business, said:

"We remain steadfast in our commitment to enabling advisors to operate more efficiently, so they can serve their clients more effectively. The continued expansion of our relationship with Diversified shows how we can best support the totality of a growing advisory enterprise—whether we're solving for business evolution or transition, a financial advisor's needs, or an investor's individual goals.

"As we advance our capabilities and market presence, Andrew, Mike, and the entire Diversified family play an important role as a strategic partner in SEI's growth. Congratulations to the whole team on this major business milestone, which represents the impactful advice they provide to their clients. We're honored to help Diversified be a more meaningful part of their clients' lifelong financial stories and look forward to serving their growing team for years to come."

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 June 30, 2024, SEI manages, advises, or administers approximately $1.5 trillion in assets. For more information, visit seic.com.

About Diversified, LLC
Diversified LLC is an SEC Registered Investment Advisor (RIA) with offices in five states, offering financial planning, investment management, tax planning and insurance services through all stages of our client's lives. As of June 30, 2024, Diversified serves clients in 40 states and strives to offer everything clients may need financially under one roof. Learn more at diversifiedllc.com.

Company Contacts:	Media Contact:
Emily Baldwin	Kerry Mullen
SEI	Vested
+1 610-676-3262	+1 917-765-8720
ebaldwin@seic.com	kerry@fullyvested.com
Sarah Thomas	
Diversified LLC	
+1 302-765-3500	
sarah@diversifiedllc.com	

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