

September 17, 2024



Knights of Columbus Asset Advisors Selects SEI for Custody and Technology

Stability, Flexibility, and Dedicated Service Deepen Strategic Partnership

OAKS, Pa., Sept. 17, 2024 /PRNewswire/ -- [SEI](#)® (NASDAQ: SEIC) today announced that Knights of Columbus Asset Advisors® (KoCAA) expanded their strategic partnership across technology, operations, asset management, and advisor services for KoCAA's individual and institutional wealth management business. An existing client leveraging SEI's fund administration services, KoCAA is moving more than \$500 million in assets under management (AUM) to the SEI Wealth PlatformSM, and the firm's financial advisors have embraced these additional capabilities to better serve their clients.

Based in New Haven, CT with financial advisors across the U.S., KoCAA is a full-service investment firm dedicated to investing according to Catholic principles, serving institutional and retail clients while managing the investment portfolio for its parent company, Knights of Columbus, the world's premier lay Catholic men's organization. With more than \$27 billion in AUM as of June 30, 2024, KoCAA specializes in mutual funds, private wealth management, philanthropic solutions, and more.

Commenting on why Knights of Columbus Asset Advisors expanded its relationship, Anthony Minopoli, President and Chief Investment Officer, said:

"We're thrilled to deepen our longstanding relationship with SEI, who has been serving independent advisors for more than 30 years. SEI's team, which provides dedicated service, allows us to deliver a personalized, connected experience for our clients—and scale our business based on our needs today and in the future."

KoCAA is benefitting from the breadth of SEI's capabilities, forged over five decades of growth and commitment to the financial services industry, including the client asset custody structure of SEI Private Trust Company, the combination of advisor and investor technology that's built for efficiency, and a dedicated service model.

Highlighting the benefits of a consultative approach, Gabriel Garcia, Managing Director of RIA Client Experience for SEI's Advisor business, said:

"We've built a premier destination for growth-minded RIAs because we serve our clients based on their needs at any stage of their business. And our focus on building consultative

relationships with our clients not only strengthens the connections we build with them, but also strengthens the connections they build with their clients.

"Our expanded relationship with Knights of Columbus Asset Advisors represents how we can best support the totality of the wealth management landscape—whether we're solving the needs of a financial advisor, wealth manager, or the full enterprise."

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 Knights of Columbus Asset Advisors (KoCAA)

KoCAA is an SEC registered investment adviser that maintains a principal place of business in the State of Connecticut. For information about KoCAA's business operations, and before engaging KoCAA to provide any services, current prospective clients should consult the Firm's Form ADV disclosure documents, the most recent versions of which are available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Knights of Columbus Asset Advisors, LLC, is a wholly-owned subsidiary of Knights of Columbus, the world's premier lay Catholic men's organization. The Knights of Columbus Funds are distributed by SEI Investments Distribution Co. (1 Freedom Valley Dr., Oaks, PA 19456) a wholly owned subsidiary of SEI. SEI Investments Distribution Co. is not affiliated with Knights of Columbus Asset Advisors.

Company Contact:

Emily Baldwin

SEI

+1 610-676-3262

ebaldwin@seic.com

Media Contact:

Kerry Mullen

Vested

+1 917-765-8720

kerry@fullyvested.com

View original content:<https://www.prnewswire.com/news-releases/knights-of-columbus-asset-advisors-selects-sei-for-custody-and-technology-302249490.html>

SOURCE SEI Investments Company