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SEI Drives Adoption of New Professional Services Offering

Comprehensive Offering Powers Business Transformation and Growth

OAKS, Pa., Oct. 31, 2024 /PRNewswire/ -- [SEI](#)® (NASDAQ:SEIC) today announced that nine U.S. clients in the company's Private Banking and Wealth Management business have adopted its new professional services offering to support a total of 17 client projects. SEI's professional services help businesses mitigate risk, create scale and value, and drive growth by providing a comprehensive suite of specialized technology solutions and consultative services designed to help transform firms' technology infrastructure, operations, and customer experience.

Sanjay Sharma, Global Head of SEI's Private Banking and Wealth Management business, said:

"The pace of technological evolution isn't slowing down, and the financial services industry continues to navigate the need for business transformation as customer demands increase. Many firms need the support of a long-term strategic partner to provide the expertise and resources for planning, managing through change, and implementing processes—all tailored to their business' needs, timelines, and objectives.

"For more than 55 years, we've enabled our clients' digital transformation while providing the stability that comes from being a part of the industry's backbone. These deep relationships are a testament to our client-centric approach of working *with* our clients to understand their businesses, align their technology and business strategies, and customize programs that meet their needs. Our new professional services offering complements the breadth of our enterprise capabilities across technology, operations, and asset management—further unlocking the potential to power growth for our clients and SEI."

Available as standalone services, SEI's offering is technology-agnostic and built specifically for a firm's individual business needs. Equipping organizations with the tools that leverage the full power of SEI's domain expertise, the offering is intentionally flexible to help ensure firms receive a best-fit solution, support, and resources. Services include:

- **Outsourced CTO services:** Provides comprehensive support for companies' technology needs to empower them to achieve business objectives and maintain a competitive edge

- **System integration:** Enhances operational efficiency, data security, and regulatory compliance to amplify client and colleague experiences and business growth
- **Application development and design:** Offers an in-depth approach to application development to generate software that meets high functionality, scale, and usability standards
- **Organizational change management:** Facilitates seamless transitions to ensure employees are prepared, engaged, and supported throughout transformation processes and their journey to the target operating model
- **Data cloud and analytics:** Manages data assets, promotes data integrity, and leverages data for informed decision-making that improves employee productivity and drives growth
- **Business process outsourcing:** Offers fully outsourced workforce model for firms that own custody accounts and are looking for staff to support operations functions
- **Workforce augmentation:** Offers specialized resources to augment or supplement the client workforce with the domain-rich skills such as business analysts, technical leads, project managers, developers, and more

Deen Bandhu, Head of SEI's Professional Services offering, added:

"SEI's professional services offering aims to enhance operational efficiency, compliance, technology infrastructure, scale, and customer experience for firms of all shapes and sizes in a landscape of constant change. Keeping pace isn't just a technology issue—it requires breakthrough change, and the right people and processes are needed to support business transformation.

"Our track record of on-time, on-budget delivery and position in the financial services ecosystem reinforce the depth and breadth of our industry knowledge and expertise, as well as our ability to provide the services and solutions that build connections and power the future of wealth."

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 Sept. 30, 2024, SEI manages, advises, or administers approximately \$1.6 trillion in assets. For more information, visit seic.com.

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