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SEI Research Indicates 71% of Wealthy Investors Offer Advisors an Untapped Opportunity to Manage More of Their Assets

Findings Reveal Opportunities for Advisors to Drive Organic Growth by Reducing Tax Drag, Enabling Asset Consolidation, and Delivering More Personalized Advice

OAKS, Pa., Sept. 10, 2026 /PRNewswire/ -- SEI® (NASDAQ: SEIC) today announced the findings from a series of proprietary surveys of financial advisors and high-net-worth investors, revealing a communication gap that may be limiting advisors' ability to capture held-away assets and deliver household-level advice. According to the surveys, while 95% of advisors say they actively try to consolidate client assets and 81% say they tell clients they offer household portfolio management, 71% of high-net-worth investors say their advisor has never asked to manage a greater share of their assets.

The research also shows that household portfolio management represents a meaningful growth opportunity for advisory firms, but many advisors remain constrained by the technology, data, and operational resources needed to deliver it at scale.

Household portfolio management, also known as the unified managed household (UMH), enables advisors to manage a client's assets across accounts as one coordinated portfolio, supporting tax efficiency, asset location, rebalancing, withdrawal planning, and long-term wealth optimization.

Held-away assets present advisors with an opportunity for organic growth

Among high-net-worth investors, 88% say they keep some assets away from their primary advisor, and 47% have three-quarters or less of their assets with that advisor. Yet investors indicate they are willing to consolidate when advisors can demonstrate tangible financial value: 46% say tax savings would motivate them to move more assets to their primary advisor, followed by increased retirement income and lower fees as additional motivators. More than one-third of investors say they would be highly likely to move more assets within a year if an advisor showed them how much they could save on taxes.

Barriers to advisor adoption

Delivering household portfolio management remains highly resource-intensive. Advisors who provide services such as asset location, rebalancing, tax-loss harvesting, and tax-smart withdrawals across multiple household accounts spend an average of 48 hours per month on related tasks, rising to 65 hours for those with the largest books and 67 hours for those serving the wealthiest clients. Much of that work is still done manually, and 30% of advisors cite lack of technology as a barrier to providing or scaling household portfolio management.

Additionally, despite the clear investor desire to understand tangible dollar amounts tied to tax savings, only 49% of advisors say they can quantify the financial benefit of every household portfolio management practice, noting key gaps including a lack of centralized data sources, the inability to view all client accounts comprehensively, and lean staffing as inhibitors.

Commenting on the research, Arthur Worthington, Senior Managing Director of Strategic Business Development & Integration at SEI, said:

"Our research found a striking disconnect between what advisors believe they are communicating and what investors are actually hearing. While advisors say they are actively seeking to consolidate assets, 71% of wealthy investors say their advisor has never asked to manage a greater share of their wealth. That gap has real implications for firms' organic growth.

"Advisors need technology and operational infrastructure that can make household-level value tangible, measurable, and personal to each investor. With SEI's UMH capabilities, there is an opportunity to go beyond talking about the benefits of managing assets across the household and actually show investors how value is being delivered. More than one-third of investors said they would be highly likely to move additional assets within a year if an advisor quantified the tax savings in dollar terms, yet only about half of advisors say they can consistently quantify those benefits. UMH can help advisors bridge that gap, demonstrate measurable value, and deepen client relationships, in turn driving long-term growth."

Methodology

SEI surveyed 518 financial advisors about household portfolio management between Jan. 27 and Jan. 29, 2026. Among respondents, the average advisor age was 55. The average client net worth was $2.9 million. Average firm AUM was $523 million for advisors working as part of a team, and $205 million for advisors in individual practices. The survey was conducted by FUSE Research Network, LLC.

SEI surveyed 302 U.S. adults between the ages of 50-70 who are currently working with a financial advisor and have investable assets of at least $1 million. The survey was conducted April 24, 2026 through April 30, 2026 by YouGov from its panel of individuals who have agreed to answer surveys.

About SEI®

SEI (NASDAQ:SEIC) is a leading global provider of financial technology, operations, and asset management services within the financial services industry. SEI tailors its solutions and services to help clients more effectively deploy their capital—whether that's money, time, or talent—so they can better serve their clients and achieve their growth objectives. As of June 30, 2026, SEI manages, advises, or administers approximately $2.1 trillion in assets. For more information, visit seic.com.

Forward-looking statements

This communication contains forward-looking statements within the meaning of the rules and regulations of the Securities and Exchange Commission. In some cases, you can identify forward-looking statements by terminology, such as "may," "will," "expect," "believe," "can," "continue," "seek," or similar expressions.

SEI's forward-looking statements include its current expectations as to:

- the benefits of technologies and operational capabilities designed to support household portfolio management; and
- the potential impact of household portfolio management on advisor efficiency, client engagement, and business growth.

You should not place undue reliance on any forward-looking statements, as they are based on the current beliefs and expectations of management and are subject to significant risks and uncertainties, many of which are beyond management's control or are subject to change. Although management believes the assumptions upon which the forward-looking statements are based are reasonable, they could be inaccurate. Some of the risks and important factors that could cause actual results to differ from those described in SEI's forward-looking statements can be found in the "Risk Factors" section of SEI's Annual Report on Form 10-K for the year ended Dec. 31, 2025, filed with the Securities and Exchange Commission. **SEI undertakes no obligation to update or revise any forward-looking statements, whether as a result of new information, future events, or otherwise.**

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