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SEI Appoints Paul Lehman to Lead Bank Asset Management Distribution

Appointment Strengthens Commitment to Delivering Investment Solutions Built for Wealth Management Evolution

OAKS, Pa., Jan. 15, 2026 /PRNewswire/ -- [SEI](#)® (NASDAQ: SEIC) today announced that Paul Lehman, CFA, has joined the company as Head of Bank Asset Management Distribution, reporting to Michael Lane, Head of SEI's Asset Management business. In this new role, Lehman will lead SEI's bank asset management distribution strategy, overseeing investment sales and partnership development across national, regional, and community banks, affiliated wealth organizations, and independent trust companies.

Lehman will be responsible for deepening and broadening SEI's relationships with existing bank clients as well as expanding delivery of asset management capabilities to new bank and affiliated wealth clients. He will also work closely with leaders within investment product development and across the enterprise to deliver coordinated investment solutions aligned with banks' evolving business models and regulatory structures.

Commenting on Lehman's appointment, Lane said:

"SEI is at the forefront of delivering investment solutions designed to help clients navigate complexity and drive long-term outcomes. As banks increasingly seek to differentiate their wealth and trust platforms, we are focused on bringing SEI's investment strategies to market in ways that align with evolving business and regulatory models. We consistently hear from banks and affiliated wealth organizations that they desire to do more with fewer partners. Our advanced capabilities—including both public and private individual solutions, as well as our OCIO and Co-CIO offerings—can be seamlessly integrated within SEI's technology platform to meet the need for streamlined, comprehensive investment solutions.

"Paul's deep understanding of the investment, bank trust, and wealth landscape, combined with his experience building and scaling national distribution teams, makes him an outstanding fit for this critical role. He brings the leadership, strategic vision, and fiduciary expertise needed to deliver SEI's investment solutions and further enhance the client experience."

Lehman added:

"Banks are rethinking how they deliver investment and wealth solutions to clients. SEI has a strong reputation for innovation, partnership, and fiduciary excellence across asset management, operations, and technology. I'm looking forward to working with the teams to help bank trust and wealth businesses evolve, grow, and better serve their clients in an increasingly complex environment."

Lehman joins SEI with more than 30 years of experience leading and advising bank trust and wealth organizations. Most recently, he served as Head of the Bank Trust Group at Dimensional Fund Advisors, where he led a national team supporting bank and trust company partners. Earlier in his career, Lehman held senior leadership roles at First Citizens Bank, where he served as Chief Investment Officer and Head of Capital Management. He began his career in banking and wealth management at several major institutions, advising high-net-worth clients and families on investment management and long-term financial planning.

Lehman is a Chartered Financial Analyst and is a member of the CFA Institute. He holds a bachelor's degree from the University of South Carolina and a master's degree in business psychology from Franklin University.

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 Sept. 30, 2025, SEI manages, advises, or administers approximately \$1.8 trillion in assets. For more information, visit seic.com.

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