

March 31, 2026



## Huntington National Bank Selects the SEI Wealth Platform<sup>SM</sup>

*Streamlined Technology and Operations Infrastructure Aims to Fuel Growth of Wealth Management Business*

OAKS, Pa., March 31, 2026 /PRNewswire/ -- [SEI](#)<sup>®</sup> (NASDAQ: SEIC) today announced that The Huntington National Bank (Huntington), a wholly-owned subsidiary of Huntington Bancshares Inc. (NASDAQ: HBAN), has selected the SEI Wealth Platform<sup>SM</sup> (SWP) to advance and unify its wealth management systems and capabilities.

Through this strategic relationship, Huntington Private Bank will transition to SWP and rely on SEI's support across technology, operations, and asset management functions. The move will create a unified infrastructure with the goal of a more integrated and automated experience for investment professionals, advisors, and their customers. Huntington will also gain access to SEI's premier ecosystem of solutions for private banks, including the SEI Access<sup>™</sup> alternative investments platform and SEI LifeYield for premium tax management capabilities.

Additionally, as a part of the technology enhancement initiative, Huntington will implement SEI Data Cloud services, as well as SEI's streamlined digital workflow solution for account onboarding and other critical workflows. Huntington has engaged SEI's Professional Services business to manage critical aspects of the overall change management program and assist with systems integration, data conversion, and transition planning as it steps into the new operating model.

### **Melissa Holding, Director of Wealth Management at Huntington, said:**

"At Huntington, we've built a strong wealth management business by putting our customers and colleagues first. As we look ahead, our focus remains on sustainable growth, and this partnership with SEI strengthens our ability to deliver on that commitment.

"We believe we have found a partner that shares our culture and values while providing a unified, modern platform for the Private Bank that streamlines operations, scales with our business, and strengthens our risk management. This is an important step forward that will enable us to better serve our current customers and support future generations with more holistic, meaningful wealth solutions."

## **Sanjay Sharma, CEO of SEI International and Global Head of SEI's Private Banking business, added:**

"Banks and wealth managers continue to face tremendous pressure to deliver solutions enabled by automation, operational excellence, and digital-native, customer-centric experiences. Our engagement with Huntington will help them reimagine their wealth platforms with modern, integrated technology that improves efficiency, enhances operational control, and reinforces their advice-led model. With SEI's expansive inventory of APIs and robust data cloud solution, SWP will seamlessly integrate with Huntington's core banking systems to unlock new growth opportunities and deliver consistent, scalable, and enhanced experiences for their private bank and high-net-worth customers.

"We are excited to work with the Huntington team to help them deliver a more holistic, tailored wealth experience for advisors and end customers—supporting their growth while reinforcing their role as a strategic financial partner."

As of December 31, 2025, SEI has approximately \$8.1 trillion in assets on its wealth management platforms, with \$1.9 trillion in assets on SWP and \$1.2 trillion in assets custodied with SEI Private Trust Company (SPTC). As of December 31, 2025, SEI serves a broad range of client types of all sizes and complexity, including 8 of the top 20 largest U.S. banks\*.

\*Based on the American Bankers Association's "25 Largest Institutions by Fiduciary Assets" list of FDIC regulated institutions, published as of Nov. 25, 2025.

### **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 Dec. 31, 2025, SEI manages, advises, or administers approximately \$1.9 trillion in assets. For more information, visit [seic.com](https://seic.com).

### **About the SEI Wealth Platform<sup>SM</sup>**

The SEI Wealth Platform (the Platform) is an outsourcing solution for wealth managers encompassing wealth processing services and wealth management programs, combined with business process expertise. With the Platform, SEI provides wealth management organizations with the infrastructure, operations, and administrative support necessary to capitalize on their strategic objectives in a constantly shifting market. For more information, visit [seic.com/wealthplatform](https://seic.com/wealthplatform).

### **About Huntington**

Huntington Bancshares Incorporated is a \$279 billion asset regional bank holding company headquartered in Columbus, Ohio. Founded in 1866, The Huntington National Bank and its affiliates provide consumers, small and middle-market businesses, corporations, municipalities, and other organizations with a comprehensive suite of banking, payments, wealth management, and risk management products and services. Huntington operates nearly 1,400 branches in 21 states, with certain businesses operating in extended geographies. Visit [huntington.com](https://huntington.com) for more information.

### **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 that SEI may derive from its strategic relationship with Huntington;
- SEI's ability to provide platform, technology, operational, and professional services in support of wealth management organizations, including private banks;
- SEI's expectations regarding the capabilities and potential benefits of the SEI Wealth Platform, SEI Data Cloud services, digital workflows, and related solutions; and
- the potential impact of SEI's services and solutions on operational efficiency, scalability, and service delivery for wealth management clients generally.

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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