

December 18, 2019



Connor Broadley Adopts SEI Wealth Platform

Technology Enables Efficiency and Scale to Support Growth Ambitions

LONDON, Dec. 18, 2019 /PRNewswire/ -- SEI (NASDAQ:SEIC) today announced that UK wealth manager Connor Broadley will adopt the SEI Wealth PlatformSM (SWP). Connor Broadley has chosen to take advantage of all components of SEI's full end-to-end wealth management platform incorporating technology, core processing and operational outsourcing for the front, middle and back office.

Connor Broadley will take advantage of SWP's ability to significantly reduce manual procedures, mitigate friction in the portfolio management process and increase oversight and control. Connor Broadley chose SEI following a competitive process run by Silverhill Consulting.

Commenting on the decision to partner with SEI, James Connor, CEO of Connor Broadley, said:

"After an exhaustive due diligence process, SEI stood out as the best solution to support our ongoing commitment to excellence in client service. We were particularly impressed by their technology, and commitment to sustaining this advantage through continuing investment. We look forward to this partnership with the highly professional team at SEI, which forms a key component of our long-term growth strategy."

Commenting on the win, Brett Williams, Managing Director of UK Private Banking for SEI, said:

"We are delighted that Connor Broadley has decided to adopt the SEI Wealth Platform and look forward to partnering with them to support their growth aspirations. We understand the pressure wealth management organizations are facing for technology-driven efficiency as well as a sophisticated and superior user experience, and we remain focused on empowering effective wealth management by providing the right tools to help our clients achieve their goals."

About the SEI Wealth PlatformSM

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. The SEI Wealth Platform supports trading and transactions on 130 stock exchanges in 41 countries and 43 currencies, through the use of straight-through processing and a single operating infrastructure environment. For more information, visit: seic.com/wealthplatform.

About SEI

After 50 years in business, SEI (NASDAQ:SEIC) remains a leading global provider of investment processing, investment management, and investment operations solutions that help corporations, financial institutions, financial advisors, and ultra-high-net-worth families create and manage wealth. As of Sept. 30, 2019, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages, advises or administers \$1 trillion in hedge, private equity, mutual fund and pooled or separately managed assets, including \$335 billion in assets under management and \$662 billion in client assets under administration. For more information, visit seic.com.

About Connor Broadley

Connor Broadley is an independent, owner-managed company based in Mayfair, specialising in wealth management for private clients, and employee benefit consultancy for corporates. Established in 2007, Connor Broadley's approach to wealth management is unusual in that it places equal emphasis on high quality financial planning advice and in-house investment management expertise. For its private clients the company is responsible for £400m FUM, and its employee benefits team look after over 100 corporate clients.

Company/Media Contact:

Leslie Wojcik
SEI
610-676-4191
lwojcik@seic.com

View original content: <http://www.prnewswire.com/news-releases/connor-broadley-adopts-sei-wealth-platform-300976566.html>

SOURCE SEI Investments Company