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WTW Investments and SEI Partner to Expand Private Markets Solutions for Defined Contribution Plans

Collaboration Aims to Broaden Access to Alternative Products in Retirement Ecosystem

OAKS, Pa., Aug. 4, 2026 /PRNewswire/ -- SEI® (NASDAQ: SEIC) and WTW Investments, a global advisory, broking, and solutions company, today announced an expansion of their strategic relationship to support the development of private markets solutions for the 401(k) and broader U.S. defined contribution market.

Building on WTW's experience integrating private markets into defined contribution (DC) solutions since 2018, the relationship combines WTW's investment research and portfolio implementation capabilities with SEI's trust and platform capabilities through SEI Trust Company (STC), a leading provider of trustee, operational, and administrative services for collective investment trusts (CITs).

Together, the firms aim to help plan sponsors and participants gain access to more diversified sources of return through structures designed for the operational, governance and liquidity needs of the DC market. The collaboration also reflects growing demand for institutionalized structures that can help bring alternative investment strategies into defined contribution plans with the governance, oversight, and operational support required by the retirement market.

Commenting on the expanded partnership, Christy Loop, Head of U.S. Wealth and Strategic Initiatives at WTW, said:

"A key challenge for defined contribution plans is ensuring sponsors have the right wrapper, structure and terms to integrate diversifying exposures like private credit. By combining our strengths with SEI's expertise in designing fit for purpose vehicles for DC plans, we can expand participant access to private markets, enhancing diversification and providing differentiated sources of return to support long-term wealth accumulation."

WTW will provide investment and operational due diligence and research support for private markets strategies used in retirement-focused CIT and evergreen solutions. As part of the expanded relationship, WTW selected SEI Trust Company to support the delivery of certain

WTW retirement solutions through CIT structures, reflecting the firms' broader collaboration across retirement and private markets initiatives.

The firms are also collaborating on the design of new products and structures intended to broaden access to private markets through vehicles suited to the needs of defined contribution plans. The expanded relationship reflects a shared commitment to product innovation and to helping the retirement market—including plan sponsors, consultants, and investment managers—evaluate how private markets exposures can be integrated into DC plans over time at scale and with appropriate risk management.

Sean Lawlor, Head of Public Markets for SEI's Investment Managers business, added:

"The ongoing convergence of public and private markets is fueling new opportunities for more diversified investment solutions through flexible, efficient CIT vehicles. With more than 30 years of experience as an independent CIT trustee, SEI's operational expertise complements WTW's investment acumen and supports the delivery of these strategies in a vehicle designed for scale, governance, and the evolving needs of the defined contribution ecosystem.

"Together, we're helping connect private markets innovation with retirement-focused solutions designed to support long-term participant outcomes."

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.

About SEI Trust Company
SEI Trust Company (the "Trustee") serves as the Trustee of the Fund(s) and maintains ultimate fiduciary authority over the management of, and the investments made, in the Fund(s). The Fund(s) are part of a Collective Investment Trust (the "Trust") operated by the Trustee. The Trustee is a trust company organized under the laws of the Commonwealth of Pennsylvania and wholly owned subsidiary of SEI Investments Company (NASDAQ: SEIC).

About WTW Investments
WTW's Investments business is focused on creating financial value for end investors through its expertise in risk assessment, strategic asset allocation, fiduciary management and investment manager selection. It has over 900 colleagues worldwide, more than 1,000 investment clients globally, assets under advisory of over US$4.7 trillion and US$178.8 billion of assets under management.

About WTW
At WTW (NASDAQ:WTW), we provide data-driven, insight-led solutions in the areas of people, risk and capital. Leveraging the global view and local expertise of our colleagues serving 140 countries and markets, we help organizations sharpen their strategy, enhance organizational resilience, motivate their workforce and maximize performance. Working shoulder to shoulder with our clients, we uncover opportunities for sustainable success—and provide perspective that moves you.

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 and WTW may derive from their expanded strategic relationship;
- SEI's ability to support the development and delivery of private markets solutions for the defined contribution market; and
- the anticipated impact of the firms' collaboration on expanding access to private markets.

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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