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SEI and Carlyle Enhance Partnership to Expand Private Market Access Across Wealth and Retirement Channels

Strategic Partnership Aimed at Supporting More Efficient and Scalable Private Market Implementation

OAKS, Pa., April 30, 2026 /PRNewswire/ -- [SEI](#)[®] (NASDAQ: SEIC), a leading global provider of financial technology, operations, and asset management services, and global investment firm [Carlyle](#) (NASDAQ: CG), today announced an enhanced partnership, designed to expand access to institutional-quality private market capabilities across wealth and retirement channels, including through the development of new collaborative solutions. As demand for private markets continues to grow, investors and their advisors are seeking more streamlined and efficient ways to access a broader range of private market strategies within their portfolios.

The strategic partnership builds on a multi-year relationship between Carlyle and SEI and brings together Carlyle's global private markets expertise, deep investment experience, and client-focused approach with SEI's capabilities across research, implementation, and client delivery. Together, the firms will aim to support the development of private market solutions for wealth and retirement investors including the design of model portfolios. The enhanced relationship will also include collaboration on private market strategies for the defined contribution market, reflecting SEI's leading position in the retirement services space.

This next phase of the partnership builds on a long-standing relationship between Carlyle and SEI, which has focused on fund administration and technology enablement.

Commenting on the partnership, Michael Lane, Head of Asset Management at SEI, said:

"One of the most common questions we hear from clients is how to allocate to private markets. Our objective with Carlyle is to help simplify that decision by providing more streamlined access to a broader range of strategies. SEI's heritage in manager research and private market allocation, combined with Carlyle's strength as a leading originator and investor, can help support clients as private markets continue to evolve."

Jeff Nedelman, Co-President and Global Head of Client Business at Carlyle, added:

"This partnership reflects the increasing role of private markets across the wealth and retirement landscape. For nearly four decades, Carlyle has focused on creating long-term value for our clients, and we're committed to bringing that approach to these channels in a way that reflects how these markets operate today. SEI brings a deep understanding of this ecosystem, and we look forward to continuing our work together to support greater participation in private markets for individual investors."

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 March 31, 2026, SEI manages, advises, or administers approximately \$1.9 trillion in assets. For more information, visit seic.com.

About Carlyle

Carlyle (NASDAQ: CG) is a global investment firm with deep industry expertise that deploys private capital across three business segments: Global Private Equity, Global Credit, and Carlyle AlInvest. With \$477 billion of assets under management as of December 31, 2025, Carlyle's purpose is to connect people, ideas, and capital to fuel growth for companies and performance for investors. Carlyle employs more than 2,500 people in 27 offices across four continents. Further information is available at carlyle.com. Follow Carlyle on X @OneCarlyle and LinkedIn at The Carlyle Group.

IMPORTANT INFORMATION

This press release is provided for informational purposes only and does not constitute an offer to sell or the solicitation of an offer to buy any securities. Any offer of securities will be made only by means of a prospectus or other applicable offering documents when available.

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 partnership with Carlyle;
- the demand for private market solutions;
- SEI's ability to support clients' private market needs and objectives through the partnership, including expanding access to private market capabilities and helping reduce complexity; and
- the anticipated impact of SEI's capabilities, in combination with Carlyle's expertise, on the delivery of scalable solutions and the client experience across the wealth and retirement ecosystem.

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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🔗 View original content: <https://www.prnewswire.com/news-releases/sei-and-carlyle-enhance-partnership-to-expand-private-market-access-across-wealth-and-retirement-channels-302758513.html>

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