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Syverson Strege Partners with SEI to Elevate Financial Planning Experience

Unified Approach to Investment Management, Custody, and Technology Shapes Future Growth

OAKS, Pa., Nov. 18, 2025 /PRNewswire/ -- [SEI](#)® (NASDAQ:SEIC) today announced that Syverson Strege, a leading fee-only financial planning and investment management firm managing \$1 billion in assets under management and headquartered in West Des Moines, IA, has selected SEI to help advance its vision and strategic growth initiatives. This collaboration marks a significant milestone in Syverson Strege's mission to enrich and empower clients' lives through clarity, confidence, and financial freedom.

Founded on the principle that financial advice should be objective and personalized, Syverson Strege has built a reputation for delivering comprehensive, coordinated planning tailored to each client's life goals. The combination of SEI's strategic support and integrated ecosystem, including open-architecture technology, custody services, and investment management, will help Syverson Strege enhance its operational efficiency and client experience.

Through SEI's Wealth PlatformSM, Syverson Strege will gain access to:

- **Integrated custody and technology** to streamline operations and reduce administrative complexity
- **Investment management and portfolio solutions** tailored to client needs
- **Advanced planning capabilities** to support tax optimization, income strategies, and long-term financial wellness

Commenting on Syverson Strege's path forward, Chief Investment Officer Jason Gunkel, said:

"After spending almost one year conducting due diligence on several different custodians, we chose SEI based on their technology platform and operational capabilities. We believe that the SEI Wealth Platform will enable us to manage our clients' accounts efficiently and give our clients a modern, easy-to-use experience.

"We are familiar with SEI's dedication to customer service, and we believe that aligns with our dedication to putting clients' interests first. Their trust platform helps ensure our clients'

accounts will be safeguarded, while also receiving the attention and service they deserve."

With this transition, Syverson Strege will migrate its assets to SEI's platform and leverage SEI's Business Transition team to ensure a smooth onboarding process. The firm's clients can expect enhanced digital experiences, deeper planning insights, and continued access to the trusted advisors who have guided them for decades.

Gabriel Garcia, Head of RIA Client Strategy and Experience at SEI, added:

"Our ecosystem is designed to be more than a collection of services—it's a connected framework that empowers firms like Syverson Strege to scale with purpose, innovate with confidence, and deliver a truly elevated client experience. By integrating custody, technology, investment management, and strategic support, we help advisors unlock new efficiencies and deepen their impact.

"Syverson Strege's client-first approach emphasizes clarity and confidence through a commitment to education and holistic planning, which aligns perfectly with our values. We're honored to support them and look forward to helping propel their continued growth and transformation."

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.

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. For more information, visit seic.com/wealthplatform.

About Syverson Strege

Syverson Strege is a fee-only financial planning and investment management firm based in West Des Moines, Iowa. Since its founding, the firm has been dedicated to understanding each client's unique situation and uncovering the lasting impact they want to have. A custom financial plan from Syverson Strege helps achieve clarity and harmony between financial goals and life purpose. Learn more at <http://www.syversonstrege.com>.

Custody services provided by SEI Private Trust Company, a federally chartered limited purpose savings association and wholly owned subsidiary of SEI Investments Company (SEI).

Forward-looking statements

This release contains forward-looking statements by SEI within the meaning or the rules and regulations of the Securities and Exchange Commission. In some cases, you can identify SEI's forward-looking statements by terminology, such as "may," "will," "expect,"

"believe" and "continue" or "appear." Our forward-looking statements include SEI's current expectations as to:

- the benefits of its services, products and technologies;
- its focus on the forward-looking development of open-architecture technologies; and
- the timing and number of client accounts that will be migrated to and serviced by SEI Private Trust Company as well as the value of these accounts.

You should not place undue reliance on SEI's forward-looking statements, as they are based on the current beliefs and expectations of our management and subject to significant risks and uncertainties, many of which are beyond SEI's control or are subject to change.

Although SEI believes the assumptions upon which it bases its forward-looking statements 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, 2024, filed with the Securities and Exchange Commission.

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