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SEI Expands Tax Management and Overlay Capabilities

ETF Integration, Tax Transition Expansion, and Enhanced Tax Optimization Helps Advisors Strengthen Portfolio Customization and After-Tax Outcomes for Investors

OAKS, Pa., Nov. 12, 2025 /PRNewswire/ -- SEI® (NASDAQ:SEIC) today announced a significant expansion of its tax management and overlay capabilities for separately managed account (SMA) and unified managed account (UMA) solutions. The enhancements provide advisors with greater control, transparency, and optionality for tax-management customization, in an effort to support both immediate and long-term tax benefits for investors.

Built on the foundation of nearly two decades of tax overlay services, this expansion advances SEI's commitment to tax minimization, which matters most according to high-net-worth advisor practices. In fact, 73% of them consider tax minimization as their top investment objective priority[1].

Designed to help advisors optimize tax outcomes, SEI's Tax Management and Overlay capabilities now feature a more robust process. From tax transition analysis, through implementation and portfolio design, to portfolio management and client-centric reporting, these capabilities are designed to integrate tax considerations through multiple phases of the wealth management process and add value to advisor-client relationships. With the expansion, the integrated approach supports tax optimization by:

- **Transitioning existing securities**, including both individual stocks and exchange-traded funds (ETFs) with thoughtful tax analysis and potential portfolio inclusion
- **Coordinating trading and overlay management**, including both single-strategy SMAs, direct indexing, and multi-manager UMAs, to help avoid wash sales and optimize portfolio allocations
- **Enabling an annual capital gains budget**, designed to intentionally target a maximum for annual gains realization, for strategic planning and tax control
- **Automating tax-loss harvesting** with daily security and tax-lot level analysis for opportunities to realize capital losses
- **Providing investor-centric reporting** with the Estimated Taxes Saved Report, which includes both year-to-date and since-inception quantified value through integrated tax management

Erich Holland, Head of Client Experience for SEI's Advisor business, said:

"These enhancements underscore our focus on simplifying the complex and empowering investors—and deepen our belief that tax management is part of our DNA, and not just a feature. We're setting a new standard for how modern portfolios are optimized by empowering advisors and their clients to transition portfolios with greater agility and help achieve materially improved after-tax outcomes.

"Taxes are the biggest drag on investor returns, and for advisors, that means every dollar saved through tax optimization is an opportunity to deepen client relationships, differentiate their approach, and deliver measurable value. By proactively managing tax outcomes, advisors can help clients keep more of what they earn, while streamlining their operations and driving organic growth for their business."

[1]Cerulli, "Customized at Scale: A Framework for Next-Generation Advisory Platforms," October 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 Sept. 30, 2025, SEI manages, advises, or administers approximately $1.8 trillion in assets. For more information, visit seic.com.

Important Information

Separately managed accounts are offered through the Managed Account Solutions program.

Neither SEI nor its affiliates provide tax advice. Please note that (i) any discussion of U.S. tax matters contained in this communication cannot be used by you for the purpose of avoiding tax, penalties, and/or interest which may be imposed by the IRS or any other taxing authority; (ii) this communication was written to support the promotion or marketing of the matters addressed herein; and (iii) you should seek advice based on your particular circumstances from an independent tax advisor. Accordingly, Clients should confer with their personal tax advisors regarding the tax consequences of investing with SEI Investments Management Corporation (SIMC) and engaging in the tax-management techniques described herein (including the described tax loss harvesting strategies) based on their particular circumstances. Clients and their personal tax advisors are responsible for how the transactions conducted in an account are reported to the IRS or any other taxing authority on the Client's personal tax returns. SIMC assumes no responsibility for the tax consequences to any Client of any transaction.

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