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SEI Launches Digital Onboarding Solution for Collective Investment Trusts

SEI Access for CITs Modernizes Onboarding Experience Across Retirement Ecosystem

OAKS, Pa., April 14, 2026 /PRNewswire/ -- [SEI](#)[®] (NASDAQ:SEIC) today announced the launch of [SEI Access™ for CITs](#), a fully digitized, fully automated collective investment trust (CIT) onboarding experience that supports both public and private assets for defined contribution plan sponsors, advisors, recordkeepers, and asset managers.

Market demand for CITs in DC plans continues to accelerate, with CITs surpassing mutual funds in 2025 to represent more than half of total target date assets¹, but the legacy infrastructure to support this shift is lagging—onboarding remains fragmented and paper-based, resulting in long cycle times, a lack of standardized workflows, scalability challenges, and operational complexity that adds friction to adoption. SEI has advanced its technology to address these barriers, replacing manual operating processes with digital documentation and workflows to support scale.

As one of the first fully digitized, end-to-end onboarding solutions, the platform offers:

- Intelligent, automated data capture including pre-populated form filings, reducing errors and manual entry
- Digital applications that streamline review, approval, and execution
- Centralized, collaborative dashboards with real-time notifications that give stakeholders clear visibility into next steps
- Flexible infrastructure integrated into SEI's broader CIT platform, enabling governance, onboarding, and administration at scale
- The ability to add private CIT funds to the SEI Access marketplace, expanding market reach

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

"CITs are becoming mainstream in retirement plans, but the onboarding experience remains manual and fragmented. Just as mutual funds have benefited from decades of digital onboarding and automated workflows, the infrastructure supporting CITs must evolve in a similar way to meet market demand and support continued adoption.

"We're proud to help lead this evolution as one of the first trustees to offer a fully digitized, automated onboarding workflow for CITs. SEI Access for CITs builds on our existing platform to deliver a more integrated experience, bringing together fund administration and distribution while enabling collaboration across stakeholders. By driving greater operational efficiency and expanding access to institutional-quality investments, this solution reinforces our commitment to supporting every participant in the retirement ecosystem."

Unlike generic document tools or bolt-on workflows, SEI Access for CITs is designed specifically around CIT applications and retirement plan implementation processes, enabling connected collaboration across the ecosystem. By digitizing and automating critical steps, the platform helps stakeholders complete onboarding in minutes rather than hours or days.

The solution is available through SEI Access, a platform designed to provide an enhanced investment experience and increased access for wealth managers and financial advisors in the U.S. SEI launched the [onboarding platform and alternative investments product marketplace](#) in 2025 following its acquisition of [Altigo](#) and has since expanded capabilities to help clients navigate complexity and scale with confidence.

¹Morningstar, "2026 Target Date Fund Landscape."

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 Dec. 31, 2025, SEI manages, advises, or administers approximately \$1.9 trillion in assets. For more information, visit seic.com.

About SEI's Investment Managers business

SEI's Investment Managers business provides advanced operating infrastructure for investment organizations of all types to evolve and compete in a landscape of escalating business challenges. SEI's global operating platform delivers customized and integrated capabilities across a wide range of investment vehicles, strategies, and jurisdictions to investment managers and asset owners. The company's services enable users to gain scale and efficiency, keep pace with marketplace demands, and run their businesses more strategically. For more information, visit seic.com/ims.

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