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SEI Expands Advisor Services with Three Strategic Partnerships

Access to More Service Providers Helps Advisors Reduce Costs, Save Time, and Increase Efficiencies

OAKS, Pa., Feb. 6, 2025 /PRNewswire/ -- [SEI](#)[®] (NASDAQ:SEIC) today announced the expansion of its strategic partnerships with the additions of Nifty, Jump, and TIFIN Wealth. Designed to help advisors solve common business challenges while propelling their business growth, these services include client meeting support, virtual assistant support, and scalable and affordable financial planning and risk management tools.

Available to clients at a discounted rate, SEI's [advisor services](#) help reduce costs, save time, focus on client relationships, and increase efficiencies. The new strategic partnerships and services include:

- **Jump:** Allows advisor teams to cut meeting administrative time, while elevating the client and advisor experience by putting notes and tasks on AI autopilot. Their AI Meeting Assistant seamlessly integrates with many key advisor technology tools and is designed to be easy, customizable, and secure.
- **Nifty Advisor Support:** Provides registered investment advisors (RIAs) with tailored digital marketing, client servicing, and financial planning solutions. Nifty's flexible services—available on both ongoing and project-based models—enable RIAs to streamline operations, help with compliance, and focus on delivering exceptional client experiences, while helping businesses scale efficiently and reduce decision fatigue and administrative burdens.
- **TIFIN* Wealth:** Delivers a personalized investment proposal generation platform that uses advanced risk alignment as its foundation and can enhance an advisor's client view through a simple goals-based planning and financial personality assessment.

Shauna Mace, Head of Advisor Services and Practice Management for SEI, said:

"We are deeply committed to listening to our clients and evolving our comprehensive solutions to meet their needs. Whether that's through product design, technology enhancements, or expanding our network of service providers, our client-centric model helps advisors grow, scale, and adapt in a constantly evolving wealth management landscape.

"By managing valuable providers and offering access to discounted pricing, we continue to help advisors more intelligently deploy their capital so they can more effectively serve their clients."

* In February 2024, SEI announced a strategic investment in TIFIN.

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, 2024, SEI manages, advises, or administers approximately \$1.6 trillion in assets. For more information, visit seic.com.

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