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Rob Wrzesniewski to Lead Technology Enablement and Integration Across Stratos and SEI Asset Management Platforms

New Role Supports Strategic Investment in Stratos Wealth Holdings, Advancing Platform Capabilities and Long-Term Technology Strategy

OAKS, Pa., June 23, 2026 /PRNewswire/ -- [SEI](#)® (NASDAQ:SEIC) today announced the appointment of Rob Wrzesniewski as Head of Stratos Technology within SEI's Asset Management business. He will report to Jeff Benfield, Chief Product Officer at SEI, and Jeff Concepcion, Founder and CEO of Stratos, while working closely with leaders across advisor product, technology, asset management, and sales teams.

In this newly created role, Wrzesniewski will advance Stratos' technology strategy, with a focus on advisor technology oversight, platform alignment, and long-term capability development. He will also oversee SEI's advisor-facing technologies to help ensure the platforms are scalable, resilient, and deliver a consistent, high-quality advisor experience. Operating at the intersection of technology, product, and business strategy, he will help ensure Stratos technology investments align with advisor needs and SEI's enterprise objectives.

Wrzesniewski joined SEI in 1992 and has served in a variety of leadership roles across its Advisor and Private Banking businesses as well as its Investment Management Unit. Most recently, he led the Global Solutions team for SEI's Private Banking and Wealth Management business, overseeing the strategic vision, development, and implementation of SEI's global banking solutions.

Commenting on Wrzesniewski's appointment, Benfield said:

"Rob has a deep understanding of how technology, product strategy, and advisor needs come together to drive real outcomes. In this role, he will help ensure Stratos technology investments are aligned to SEI's enterprise priorities and the advisor experience, while also partnering with our Asset Management business to unlock technology-enabled insights, tools, and capabilities that support growth."

Jeff Concepcion, Founder and CEO of Stratos, added:

"Stratos was built to help advisors run stronger practices and deliver a more connected client experience. Rob's leadership will bring even tighter alignment between Stratos' platform strategy and SEI's broader technology ecosystem. This will help us accelerate how we deliver new capabilities, strengthen our advisor technology foundation, and stay ahead of what advisors need next."

Wrzesniewski said:

"I'm excited to step into this role at a time when advisors and investors expect more connected, insight-driven experiences. Stratos plays an important role in helping advisory practices grow and navigate transition planning, and that makes it essential to deliver technology that can scale with demand and keep pace with evolving workflows and regulatory requirements. I look forward to partnering across SEI and Stratos to deliver the next wave of insights and tools that strengthen portfolio management and client engagement, while focusing our investments where they will deliver the greatest value across the enterprise."

In December 2025, SEI announced the completion of the first stage of its strategic investment in Stratos Wealth Holdings. Stratos' client service model, custodial relationships, and current offerings are strengthened by SEI's capabilities across technology, custody, operations, and asset management. Together, the companies share a long-standing commitment to advisor independence, choice, and flexibility.

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.

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 potential benefits to SEI and Stratos from the advancement of Stratos' technology strategy as a result of this appointment.
- The ability of SEI's and Stratos' platforms to deliver scalable and advisor-focused technology experiences.
- The development and speed of delivery of SEI's and Stratos' new technology and capabilities to support advisor growth, client engagement, and SEI's overall enterprise objectives.

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.**

Company Contact: **Media Contact:**

Alicia Rudd

Eric Hazard

SEI

Vested

+1 610-676-3887

+1 917-765-8720

arudd@seic.com

eric@fullyvested.com

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