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SEI Expands Advisor Services Ecosystem with AI Assistant Zocks

SEI and Zocks Help Advisors Adopt AI-Powered Workflow Automation, Strengthen Client Engagement

OAKS, Pa., Aug. 12, 2026 /PRNewswire/ -- [SEI](#)® (NASDAQ:SEIC) today announced a strategic partnership with Zocks, an AI assistant built specifically for financial advisors, expanding its advisor services ecosystem of partners with a resource intended to help firms reduce administrative burdens, strengthen client engagement, and scale more efficiently.

Zocks helps automate meeting preparation, meeting notes, client follow-up, CRM and planning updates, client onboarding, forms, and client intelligence workflows. The platform is designed to help advisors spend less time on administrative work and more time delivering personalized service and advice to clients.

Commenting on the partnership, Erich Holland, Head of SEI's U.S. Wealth and Advisor Business, said:

"Advisors are moving beyond AI curiosity and looking for practical ways to embed intelligent automation into the workflows that matter most to their businesses. By adding Zocks to our ecosystem of partners, we're expanding advisor choice and making it easier for firms to access resources, education, and support that can help them adopt AI with purpose, discipline, and a clear connection to client service and business growth."

SEI's advisor services ecosystem is designed to help advisors solve common business challenges by providing access to third-party service providers, discounted pricing, and resources that support operational efficiency, practice management, and client experience. The addition of Zocks builds on SEI's commitment to helping advisors more effectively deploy their capital, including time, talent, and technology, so they can focus on the client relationships that drive long-term growth.

Shauna Mace, Head of Practice Management and Independent Advisor Solutions at SEI, added:

"AI has the potential to transform the advisor operating model, but successful adoption starts with thoughtful implementation. Zocks gives advisors another way to evaluate AI through the

lens of their own teams, workflows, and growth goals, while helping them move from time savings to deeper productivity and more proactive client engagement."

Jim Hardeman, Executive Vice President of Product at Zocks, said:

"Zocks was built to help financial advisors turn everyday client conversations into actionable intelligence without adding complexity to their practices. SEI inherently understands the operational challenges advisors face and has a strong track record of helping firms evaluate solutions that can create meaningful business impact. Together, we can help more advisors use AI to streamline meeting workflows, accelerate follow-up, improve data quality, and create more capacity for the client relationships that matter most."

As part of the relationship, SEI and Zocks plan to collaborate on advisor education, thought leadership, webinars, adoption resources, and practice management programming to help firms identify high-value use cases and build confidence in AI-enabled workflows. The relationship builds on SEI's ongoing commitment across the enterprise to modernize how it operates, innovates, and delivers value to clients through AI and automation as it advances toward becoming an AI-native organization.

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 June 30, 2026, SEI manages, advises, or administers approximately \$2.1 trillion in assets. For more information, visit seic.com.

About Zocks

Zocks is the privacy-first, agentic AI Platform for financial advisors and financial firms. Its AI assistant saves advisors 10+ hours a week by automating manual tasks and turning every client conversation, email, and document into structured data that's deeply integrated with a firm's technology stack and AI ecosystem. Advisors can build plans and onboard clients faster, find growth opportunities, anticipate servicing needs, and ultimately grow their business — all in a platform built with enterprise-grade compliance, reporting, and controls. More than 5,000 firms, including 6 of the 9 Barron's Top Mega RIAs and 2 of the top 3 life insurance carriers, rely on Zocks, the #1 rated AI Assistant for Financial Services on G2. Learn more and start a free trial at zocks.io.

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 the addition of Zocks will have on SEI's advisor services ecosystem; and
- the ability of AI-enabled workflows and automation to improve advisor productivity, efficiency, client engagement, and growth.

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.**

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