

June 3, 2025



SEI Business Audit Tool Reveals Financial Advisors' Focus on Significant Business Transitions

*Industry Prepares for Substantial Evolution,
Advisors Focused on Business Planning, Growth, and Scalability*

OAKS, Pa., June 3, 2025 /PRNewswire/ -- [SEI](#)® (NASDAQ:SEIC) today announced that advisors are actively seeking strategies intended to refine and future-proof their practice, according to data collected from its [business audit tool](#).^{*} Within the next 18 months, **40%** of respondents are considering a **significant business transition**, including selling their practices, acquiring or merging with another firm, or navigating key changes in their strategic partnerships. Succession planning and continuity planning remain top concerns, highlighting the need for structured exit strategies.

From business transitions to scaling operations, SEI's business audit tool provides advisors with personalized insights into their business health and areas of opportunity, spotlighting critical areas of focus and enabling them to strategically prioritize next steps.

Commenting on the tool, Brian Trugman, CFP® of Attitude Financial Advisors and SEI client since 2013, said:

"SEI's business audit tool is a quick, clear way for financial advisors to assess key areas of their businesses. It's a great starting point, and SEI's strategic partnership extends beyond investment management to truly understanding our needs."

The data uncovered several other prominent trends among financial advisors:

- **Growth and scalability** remain paramount, with **92%** of advisors prioritizing expanding their businesses.
- An overwhelming **80%** identified **business planning**, which includes defining the firm's vision, setting strategic direction and improving management structures, as a **top priority**.
- **More than half** (51%) cite **operational efficiency** as a top priority, aiming to strengthen their firm's foundation for scalable growth.

- **43%** of respondents are **investing in people and culture** as a core strategy for talent acquisition, retention, and long-term team development.

Shauna Mace, Head of Practice Management at SEI, said:

"The financial advisory industry is currently navigating a period of profound transformation, driven by evolving client expectations, technological advancements, and shifting demographic trends. Advisors clearly recognize the landscape is shifting, and they are taking decisive steps to not only navigate the now, but to strategically build for a resilient and successful tomorrow.

"The data shows a clear impetus toward fortifying business fundamentals, as many advisors prepare for significant long-term transitions. Transformative forces pushing on advisors from every direction make this a pivotal time to assess their practice and help ensure the right strategies and partners are in place."

This data underscores the imperative for advisors—and the industry—to proactively embrace change and plan for the future. Advisors looking to refine their strategy, scale their operations, or prepare for transition can benefit from gaining a clearer picture of their business priorities in an effort to make informed and confident decisions for long-term success.

*Data based on 240 financial advisors who completed SEI's business audit.

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, 2025, SEI manages, advises, or administers approximately \$1.6 trillion in assets. For more information, visit seic.com.

Company Contact: Media Contact:

Leslie Wojcik	Eric Hazard
SEI	Vested
+1 610-676-4191	+1 917-765-8720
lwojck@seic.com	eric@fullyvested.com

View original content: <https://www.prnewswire.com/news-releases/sei-business-audit-tool-reveals-financial-advisors-focus-on-significant-business-transitions-302471101.html>

SOURCE SEI Investments Company