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Trinity Financial Partners Hits Growth Milestone with SEI

Commitment to Goals-Based Wealth Management and Tax-Optimization Bolsters Growth

OAKS, Pa., Sept. 24, 2024 /PRNewswire/ -- [SEI](#)® (NASDAQ:SEIC) today announced that Trinity Financial Partners (Trinity) surpassed \$500 million in assets under advisement (AUA), marking a major growth milestone. As a strategic partner, Trinity leverages SEI's capabilities and services across asset management, technology, and operations, reinforcing SEI's commitment to serving the independent advisor community.

Founded in 1972 and based in Berwyn, PA, Trinity provides a comprehensive, collaborative, and intimate financial planning process, helping each client navigate the entire breadth of lifelong financial decisions. Trinity has deep expertise in tax optimization of portfolios, legacy and estate planning, complex charitable strategies, executive stock options, women in transition, and more.

Led by President and Financial Advisor Robyn Jameson, CFP®, CLTC, Trinity's mission is to help families "Plan with Purpose." With approximately \$575 million in total AUA as of June 30, 2024, the firm's team has embraced the breadth of SEI's capabilities to better serve their clients, including SEI's suite of separately managed account (SMA) investment strategies and Unified Managed Account (UMA) framework offered through the Managed Account Solutions program, SEI Private Trust Company's client asset custody structure, and integrated advisor and investor technology.

Commenting on Trinity's continued growth, Jameson said:

"Celebrating our firm's growth is exciting and something we are proud of, but growth only happens by engaging with one client at a time, offering them our sole focus and expertise, and leaning into what they value and want to achieve. We focus on a deep planning process and scaling our firm to better serve current and future clients. The seamless integration of SEI's technology and custody solutions, as well as the optionality and capabilities of SEI's UMA-based investment structure, make an impact on our collective solutions and success.

"With their stability and commitment to investing in industry-leading capabilities and business resources, SEI is a key strategic partner in our ongoing growth journey. I am also privileged to have formed relationships with many impactful individuals in the SEI network that

collectively support and challenge one another as we strive for excellence on behalf of our clients."

Highlighting the benefits of the strategic partnership, Erich Holland, Executive Managing Director of Client Experience for SEI's Advisor business, said:

"This business milestone is only one of Trinity Financial Partners' recent accomplishments, and we've been proud to support Robyn and Trinity for nearly two decades.

"We continuously look for opportunities to enhance our suite of capabilities to help advisors grow. The Trinity team has embraced the totality of what we offer and pushed us for even more innovative capabilities, which have not only benefitted Trinity and the clients they serve, but our entire advisor community."

About SEI®

SEI (NASDAQ:SEIC) delivers technology and investment solutions that connect the financial services industry. With capabilities across investment processing, operations, and asset management, SEI works with corporations, financial institutions and professionals, and ultra-high-net-worth families to help drive growth, make confident decisions, and protect futures. As of June 30, 2024, SEI manages, advises, or administers approximately \$1.5 trillion in assets. For more information, visit seic.com.

About Trinity Financial Partners

Trinity Financial Partners is a holistic wealth management firm with a deep passion to serve high-net-worth families as we collaboratively plan, model and implement each step of life's journey. For more information, visit www.trinityfinancialpartners.com.

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