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SEI Launches SEI Charitable Fund, Bringing Charitable Giving To Advisor and Client Wealth Experience

*New Donor-Advised Fund Powered by TIFIN Give Helps Advisors Integrate Philanthropy into
Wealth Planning and Deepen Relationships Across Generations*

OAKS, Pa., Oct. 28, 2026 /PRNewswire/ -- [SEI](#)® (NASDAQ: SEIC) today announced the launch of the SEI Charitable Fund, a donor-advised fund (DAF) solution powered by TIFIN Give, a TIFIN company, and sponsored by GiveClear Foundation. The solution expands the planning capabilities available through SEI's comprehensive wealth management platform to deliver a more connected client experience by incorporating charitable giving into broader wealth, tax, estate, and legacy planning conversations.

As charitable giving becomes an increasingly important component of wealth management, advisors are seeking ways to integrate philanthropy into client relationships rather than directing clients to standalone solutions. By keeping advisors at the center of charitable planning, the SEI Charitable Fund helps strengthen client relationships, foster multigenerational engagement, and streamline fund administration.

The solution is designed to help advisors:

- **Integrate charitable giving into holistic advice** to connect philanthropy with clients' broader financial and legacy objectives.
- **Create more meaningful client conversations** by helping families explore the values, priorities, and causes most important to them.
- **Engage the next generation** through shared family conversations around wealth, purpose, legacy, and giving.
- **Deliver a modern charitable experience** supported by digital-first donor-advised fund technology.
- **Deepen advisor-client relationships** by bringing another important dimension of clients' financial lives into the advice experience.

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

"Great advice isn't simply about managing a portfolio. It's about helping people use their wealth intentionally to achieve what matters most to them. For many clients, charitable giving is deeply connected to that purpose. The SEI Charitable Fund equips advisors with expanded technology capabilities that remove complexity and provide another way to invite those conversations into the broader wealth relationship, helping clients turn intentions into action while creating opportunities to engage families across generations."

Blake Rohde, Chief Operating Officer at TIFIN Give, added:

"Philanthropy represents one of the most personal intersections between wealth and purpose, and advisors are uniquely positioned to help clients navigate it. Through our expanded relationship with SEI, we're bringing together modern digital technology and trusted investment and administrative capabilities to make charitable planning easier to incorporate into the client experience, while providing donors with a flexible way to fund, invest, and distribute charitable assets over time."

The launch builds on [SEI's strategic investment in TIFIN](#), first announced in 2024, and demonstrates the firm's approach to combining its financial technology, custody, investment, and operational capabilities with specialized industry partners. Earlier this year, the companies [announced a strategic partnership](#) through which TIFIN Give provides a white-labeled donor-advised fund solution to SEI's bank and affiliated wealth clients.

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 Sept. 30, 2026, SEI manages, advises, or administers approximately \$2 trillion in assets. For more information, visit seic.com.

About TIFIN Give

[Give, a TIFIN company](#), is a donor-advised fund (DAF) platform that enables wealth firms to grow assets and strengthen relationships through modern philanthropy. By engaging the next generation, offering unmatched investment flexibility, and integrating tax-efficient strategies, TIFIN Give turns charitable giving into a strategic lever for client retention, acquisition, and expansion.

[The TIFIN Group LLC](#) (TIFIN) is a platform of products and companies that apply AI for financial services, with a focus on wealth management, asset management and insurance. TIFIN's companies include [TIFIN.AI](#), [TIFIN @Work](#), [TIFIN AMP](#), and [TIFIN Give](#). TIFIN is backed by leading investors including J.P. Morgan, Morningstar, Hamilton Lane, Franklin Templeton and SEI, among others.

SEI offers two donor-advised funds, the SEI Charitable Fund and the SEI Giving Fund.

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 benefits that advisors and clients may derive from the SEI Charitable Fund; and
- the ability of SEI's expanded relationship with TIFIN Give to enhance the charitable planning experience and support deeper, multigenerational client relationships.

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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