

Company: SEI - Oaks, PA
Company Description: 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.
Nomination Category: Company / Organization Categories
Nomination Sub Category: Company of the Year - Financial Services - Large
Nomination Title: SEI



1. Which will you submit for your nomination in this category, a video of up to five (5) minutes in length about the achievements of the nominated organization since 1 January 2023, OR written answers to the questions for this category? (Choose one):
- Written answers to the questions
2. If you are submitting a video of up to five (5) minutes in length, provide the URL of the nominated video here, OR attach it to your entry via the "Add Attachments, Videos, or Links to This Entry" link above, through which you may also upload a copy of your video.
3. If you are providing written answers for your submission, you must provide an answer to this first question: Briefly describe the nominated organization: its history and past performance (up to 200 words):

Total 200 words used.

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.

Alfred P. West, Jr. founded SEI in 1968 when he developed the first computer-based commercial credit simulator to train bank loan officers. Over 57 years, the company has expanded its front-, middle-, and back-office services and investment management solutions, as well as the markets it serves, including corporations, financial institutions and professionals, and ultra-high-net-worth families. In 2022, Ryan Hicke, a 27-year SEI veteran with extensive experience across technology and asset management in the U.S. and globally, succeeded West as CEO. Under his leadership, SEI continues to innovate and expand.

SEI has operations centers throughout the U.S., as well as in the U.K., Ireland, Luxembourg, South Africa, India, and Canada. Clients include 8 of the top 20 U.S. banks and 43 of the top 100 investment managers worldwide, and the company manages, advises, or administers approximately \$1.6 trillion in assets as of March 31, 2025.

4. If you are providing written answers for your submission, you must provide an answer to this second question: Outline the organization's achievements since the beginning of 2023 that you wish to bring to the judges' attention (up to 250 words):

Total 247 words used.

Hicke has driven the adoption of an enterprise mindset and horizontal market approach, leveraging the breadth of SEI’s capabilities across the breadth of the global markets it serves to capitalize on market trends and growth opportunities—ultimately resulting in three consecutive record earnings quarters.

To infuse fresh perspectives, he evolved executive leadership with external talent and created new functions. Sneha Shah joined SEI as Head of New Business Ventures to reinforce SEI's roots in innovation. Sean Denham joined SEI as CFO and his role recently expanded to include COO. Optimizing SEI’s operating model has driven results impacting the company’s bottom and top lines, including the alignment of talent to growth areas of the business, capital allocation to maximize ROIC, and centralizing functions and processes for efficiencies. Michael Lane joined to reimagine SEI's asset management businesses, including a focus on the RIA segment, which resulted in recently winning a breakaway RIA that manages \$2.1 billion in assets.

SEI invested in its operational footprint to support asset managers globally. SEI is the largest fund administrator for private market funds in Luxembourg that are managed by a U.S. firm and the largest private credit fund administrator by assets globally.

The company also invested in other areas to enhance its market presence and offerings, including its M&A strategy and a profitable divestiture to focus on key growth areas, as well as brand and marketing efforts to increase market awareness and favorability—uniquely positioned at the center of the financial services ecosystem.

5. If you are providing written answers for your submission, you must provide an answer to this third question: Explain why the achievements you have highlighted are unique or significant. If possible compare the achievements to the performance of other players in your industry and/or to the organization's past performance (up to 250 words):

Total 247 words used.

Since early 2023, SEI has delivered remarkable business momentum and record-breaking performance. Sales events, reflecting net new business wins, have nearly doubled, achieving an all-time high for the trailing 12 months in SEI's 57-year history. The company’s operating margin has expanded by more than 300 basis points, demonstrating enhanced efficiency. Earnings per share have soared by more than 50%, signaling robust profitability. Additionally, SEI’s share price has climbed 38% since January 2023, surpassing broader stock market performance and reaching a historic peak in Q1 2025. These results underscore SEI’s sustained excellence and leadership in the financial services industry.

SEI selected B2B International, the leading market research firm, to conduct an independent, blind brand health survey in February 2025 of decision-makers within organizations with a median value of \$18B in fiduciary assets or AUM in SEI’s target market. Demonstrating return on the marketing investment, SEI has the strongest brand health among tested brands by a considerable margin: SEI had the highest composite brand health score among the competitive set at 61% on a scale of 0-100 (next-ranked was Vanguard at 50%).

Respondents who are familiar with SEI have a very favorable opinion of the brand at 51%—the highest share among tested brands. Key strengths of SEI noted by respondents included comprehensive capabilities and solutions, as well as being large and established with a good reputation. SEI had the strongest population of loyal users among its competitive set at 52%, exceeding Morgan Stanley and Goldman Sachs at 43% each.

6. You have the option to answer this final question: Reference any attachments of supporting materials throughout this nomination and how they provide evidence of the claims you have made in this nomination (up to 250 words):

Total 173 words used.

Financial performance:

[Q1 2025 earnings release](#)

[Q1 2025 earnings presentation](#)

[2024 annual report](#)

Leadership:

[SEI Appoints Head of New Business Ventures | SEI](#)

[SEI Appoints Sean Denham as CFO | SEI](#)

[SEI Attracts New Executive Vice President | SEI](#)

RIA Breakaway:

[Summit Wealth Group Launches RIA, SEI Powers Evolved Business Model | SEI](#)

[Former \\$2.1 Billion Commonwealth Team Launches RIA - Barron's](#)

Luxembourg:

[SEI Launches Depositary Services in Luxembourg | SEI](#)

[SEI Bolsters Global Leadership with Key Appointments in Luxembourg | SEI](#)

[Luxembourg's private markets: SEI's next big move | Delano News](#)

M&A:

[SEI Acquires LifeYield | SEI](#)

[SEI Acquires Altigo | SEI](#)

[SEI Launches Alternative Investment Product Marketplace, Expands Access to Private Markets | SEI](#)

[SEI Announces Acquisition of National Pensions Trust and Strategic Partnership with XPS | SEI](#)

Brand:

[SEI tweaks Schwab with custody biz ads outside of Impact conference](#)

Innovation:

[SEI and TIFIN Partner to Power the Future of Wealth Through Artificial Intelligence | SEI](#)

[SEI and Ctrl Alt to Explore Tokenization in Bank of England's Sandbox | SEI](#)

Attachments/Videos/Links:

[SEI](#)

 [REDACTED FOR PUBLICATION]