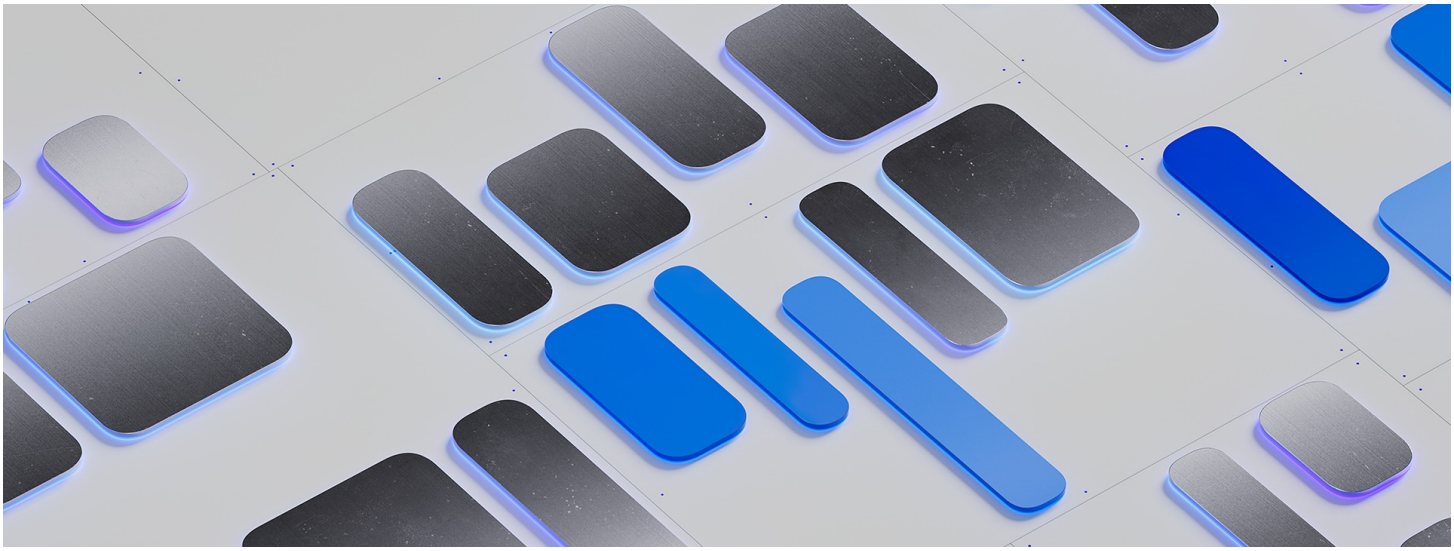
IBM Newsroom

SEI Engages IBM to Accelerate Enterprise Transformation Through Agentic AI

Collaboration Supports Enterprise Efficiency, Scalability, and Sustainable Growth



OAKS, Pa., March 9, 2026 — SEI®(NASDAQ: SEIC) today announced it has joined forces with IBM (NYSE:IBM) to accelerate enterprise transformation through agentic AI and automation and modernize how it operates, innovates, and delivers value to clients—reinforcing the company's commitment to sustainable growth.

SEI will work with IBM Consulting to conduct a comprehensive, data-driven review of its current operational systems and workflows aimed at advancing automation, process redesign, and modernization across the enterprise. The initiative is being designed to improve productivity and enhance the client experience by streamlining everyday client interactions, expanding automation of routine tasks, and enabling consistent outcomes with long-term value. With AI accelerating progress, SEI aims to build a modern, data-enabled operating foundation to support long-term growth.

"As SEI enters its next phase of growth, investing in how we operate is just as critical as investing in what we deliver. IBM brings deep industry and technical expertise that will build on our strong operational foundation and strategic vision. By deploying and scaling AI across the enterprise through a disciplined, data-driven approach, we will work more efficiently, innovate faster, and scale with confidence," said **Sean Denham, SEI's Chief Financial and Chief Operating Officer**.

"Automation will enable our teams to spend less time on manual, repetitive work and more time on higher-value, relationship-driven activities—further elevating service quality, strengthening trust among our clients, and creating more opportunities for professional growth. By making automation the engine of growth and AI its enabler, SEI is innovating with purpose to build a data-powered foundation for the future," said Denham.

"SEI has a long-standing reputation for operational excellence and building integrated solutions in a complex, highly regulated industry. By combining SEI's deep knowledge of its business with IBM's expertise in process intelligence and agentic AI, we can unlock new levels of efficiency across the enterprise. With streamlined operations and data-centric insights embedded into how work is performed, SEI is strengthening its ability to scale while further differentiating itself in the market," said **Glenn Finch, Head of U.S. Financial Services at IBM Consulting**.

IBM is working closely with subject matter experts across SEI to assess processes, systems, and data, identifying opportunities to embed agentic AI and automation into day-to-day operations and enable teams to act with greater agility as client and business needs evolve. SEI will leverage IBM's Enterprise Advantage platform as a strategic enabler to accelerate operating model transformation, fuel operational excellence, and enhance employee and client experiences—strengthening decision-making and positioning the company for a future powered by AI and data.

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 Dec. 31, 2025, SEI manages, advises, or administers approximately $1.9 trillion in assets. For more information, visit seic.com.

Forward-looking statements

This communication contains forward-looking statements within the meaning or 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," "remain" and "continue" or "appear." SEI's forward-looking statements include its current expectations as to:

- the benefits that SEI and its clients may derive from system automation and process redesign;
- the elevation of SEI's service quality based on the implementation of automation;
- SEI's ability to improve decision making and the position of the company because of the IBM relationship; and
- the benefits that SEI may derive from IBM's relationship and capabilities.

You should not place undue reliance on any forward-looking statements, as they are based on the current beliefs and expectations of management and 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.

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