SEI Investments.

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Raymond James Institutional Investor Conference

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Safe Harbor Statement

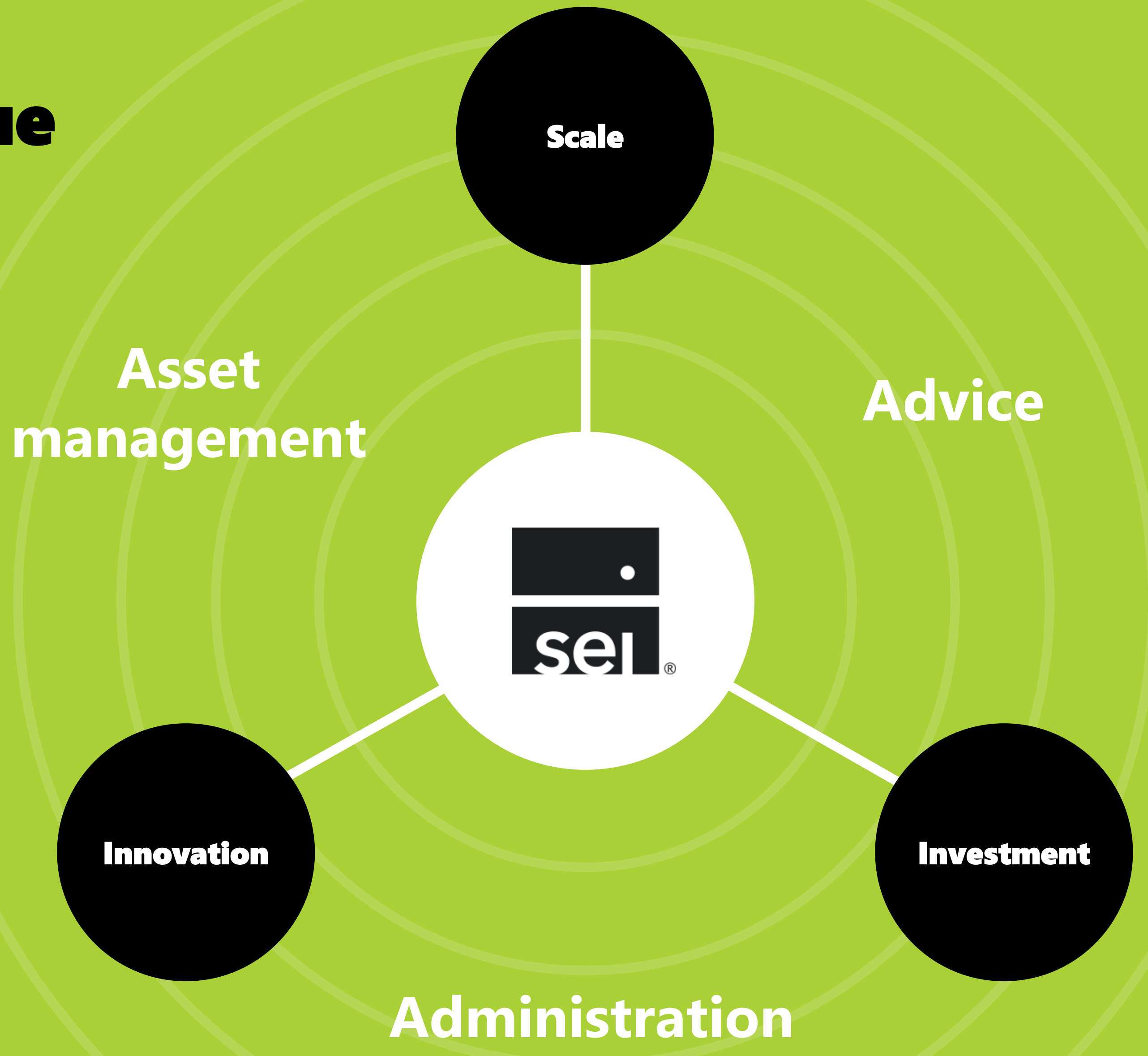
This presentation contains forward-looking statements within the meaning or the rules and regulations of the Securities and Exchange Commission. In some cases you can identify forward-looking statements by terminology, such as "may," "will," "expect," "believe," ”remain” and "continue" or "appear." Our forward-looking statements include our current expectations as to:

- our ability to maintain our sales momentum;
- how we are reshaping our operating model, deepening client engagement and relationships, strengthening our talent, and sharpening our strategic vision, if at all;
- our ability to generate earnings growth, sales events, and returns to our shareholders;
- the evolution of our go-to-market strategy;
- our ability to serve the world’s most sophisticated institutional, wealth, and asset management organizations;
- our strategic priorities and our ability to execute against these priorities;
- the strength of our position to address current and future uncertainties;
- the impacts of market uncertainty;
- the nature and scope of asset management products we will launch;
- our ability to deliver sustained, long-term growth and shareholder value;
- the demand for our products and services;
- the headwinds that may affect our businesses;
- the opportunities available to us for growth and to gain share in the markets in which we currently, and seek to, participate;
- the performance of our various businesses, including the margins and profitability of such businesses and the events that may affect the margins, profitability and growth prospects of these businesses;
- The drivers of future revenue, margin and earnings growth;
- the benefits, if any, that we or our clients may derive from acquired assets;
- the strength and elements of our balance sheet;
- the strength of our pipelines and the momentum that each may have;
- our run rate and the stability of the elements of that run rate;
- our commitment to returning annual cash flow to shareholders and the percentage of this cash flow that may be returned;
- the resiliency of our business; and
- the market dynamics affecting our businesses.

You should not place undue reliance on our forward-looking statements, as they are based on the current beliefs and expectations of our management and subject to significant risks and uncertainties, many of which are beyond our control or are subject to change. Although we believe the assumptions upon which we base our forward-looking statements are reasonable, they could be inaccurate. Some of the risks and important factors that could cause actual results to differ from those described in our forward-looking statements can be found in the "Risk Factors" section of our Annual Report on Form 10-K for the year ended Dec. 31, 2025, filed with the Securities and Exchange Commission.

Past performance does not guarantee future results.

Leveraging SEI's unique competitive position



SEI's business evolution

Legacy → Inflection → Future

2017 to 2022

7%
Avg. annual EPS growth 2017 to 2022

24%
Consolidated operating margin 2022

$364M
Avg. annual share repurchases 2017 to 2022

$69M
Total net sales events 2022

-14%
Avg. annual total shareholder return 2017 to 2022

2022 to today

18%
Avg. annual EPS growth 2022 to 2025

27%
Consolidated operating margin 2025

$616M
Total share repurchases 2025

$150M
Total net sales events 2025

46%
Avg. annual total shareholder return 2022 to 2025

"SEI 2025 to 2030"

Continued momentum

Earnings per share

Net sales events

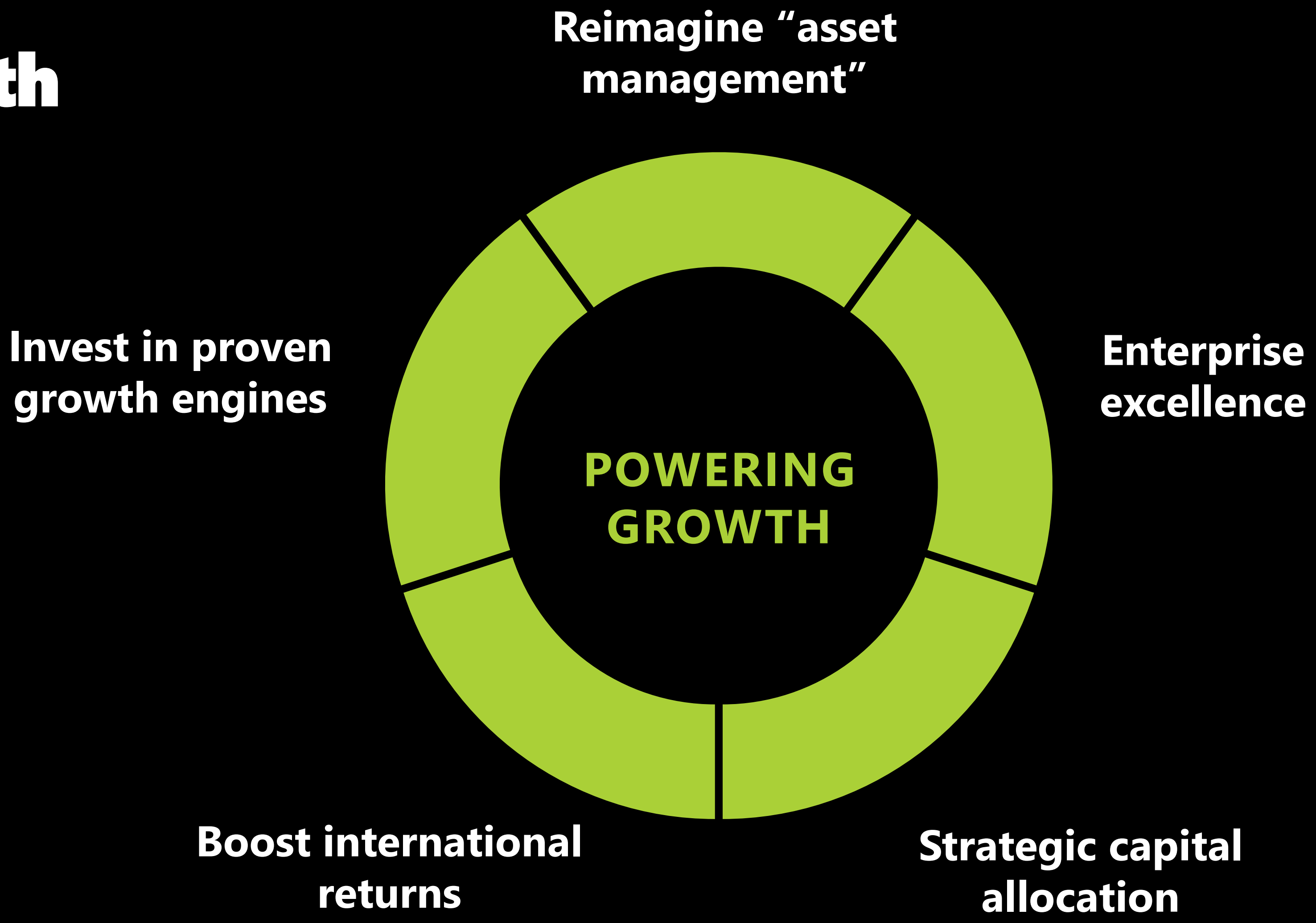
Consolidated operating margins

90-100%
Combined dividend and share repurchases % of free cash flow

Double-digit
Average annual TSR

Total shareholder return calculated using FactSet, assuming reinvestment of dividends

SEI's path to accelerating growth

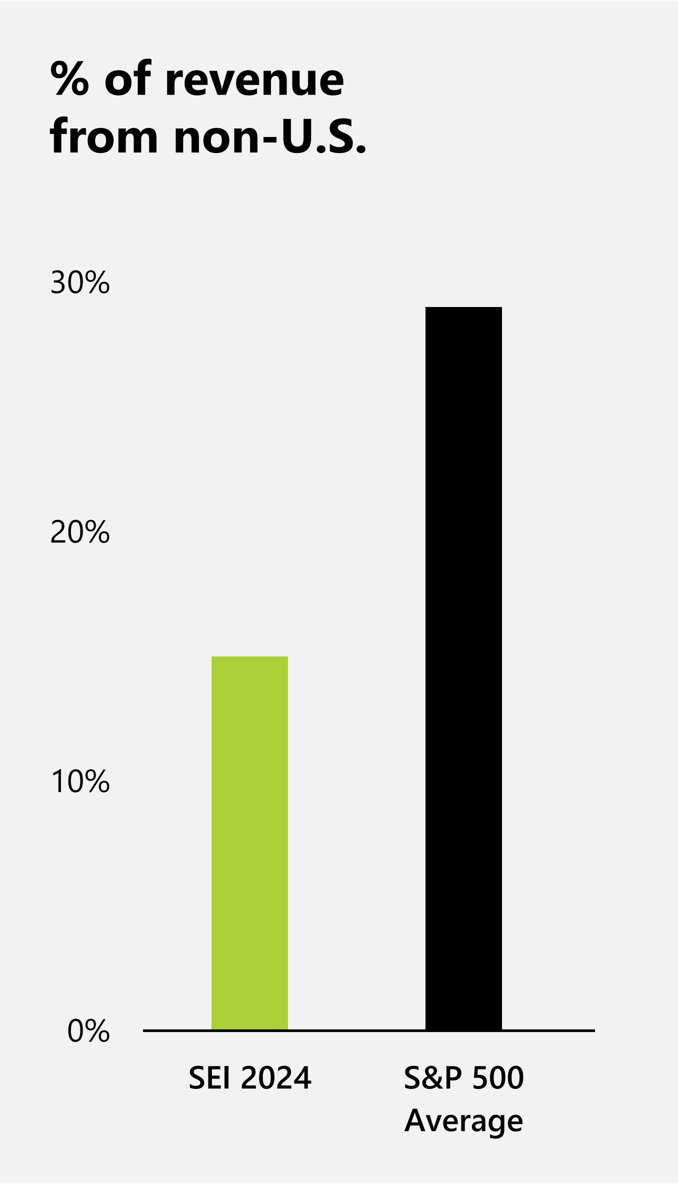


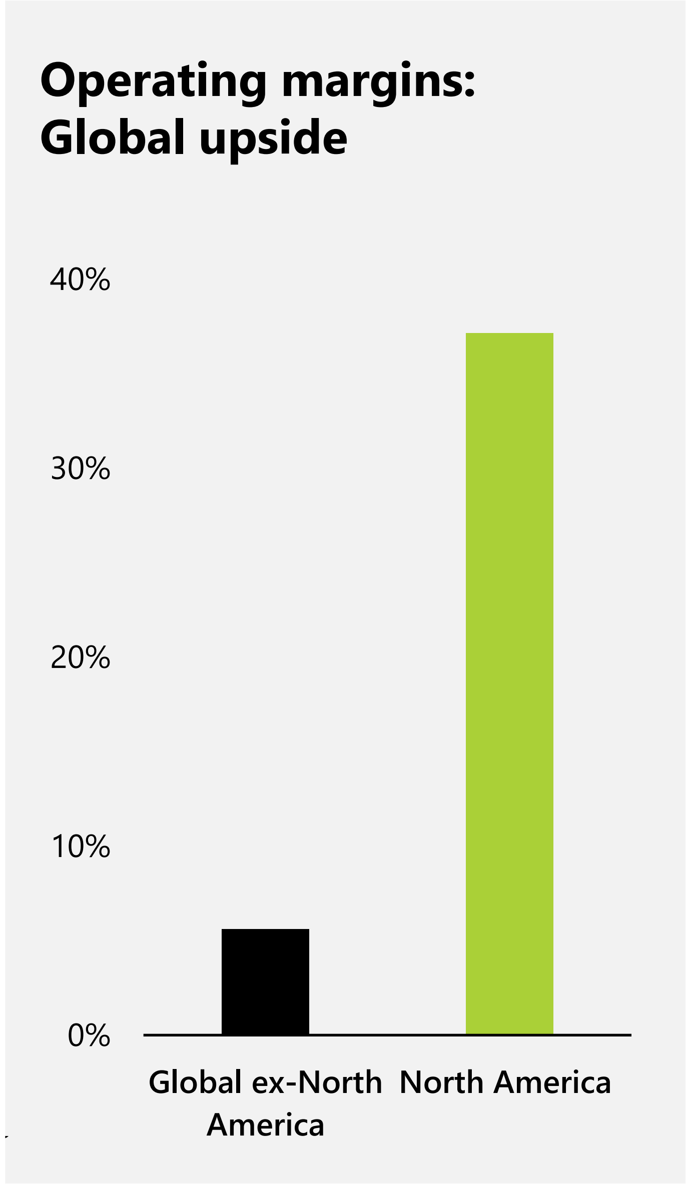
Grow the core

Move up market

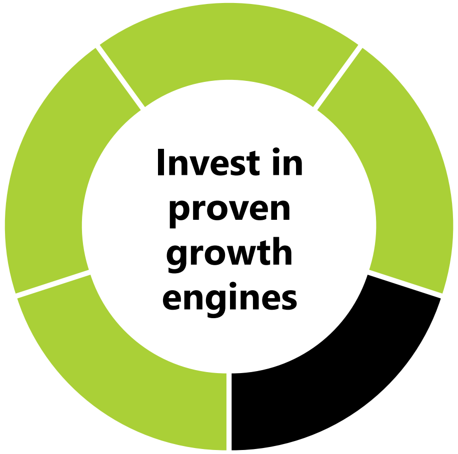
Grow wealth management capability

Significant margin upside within global business

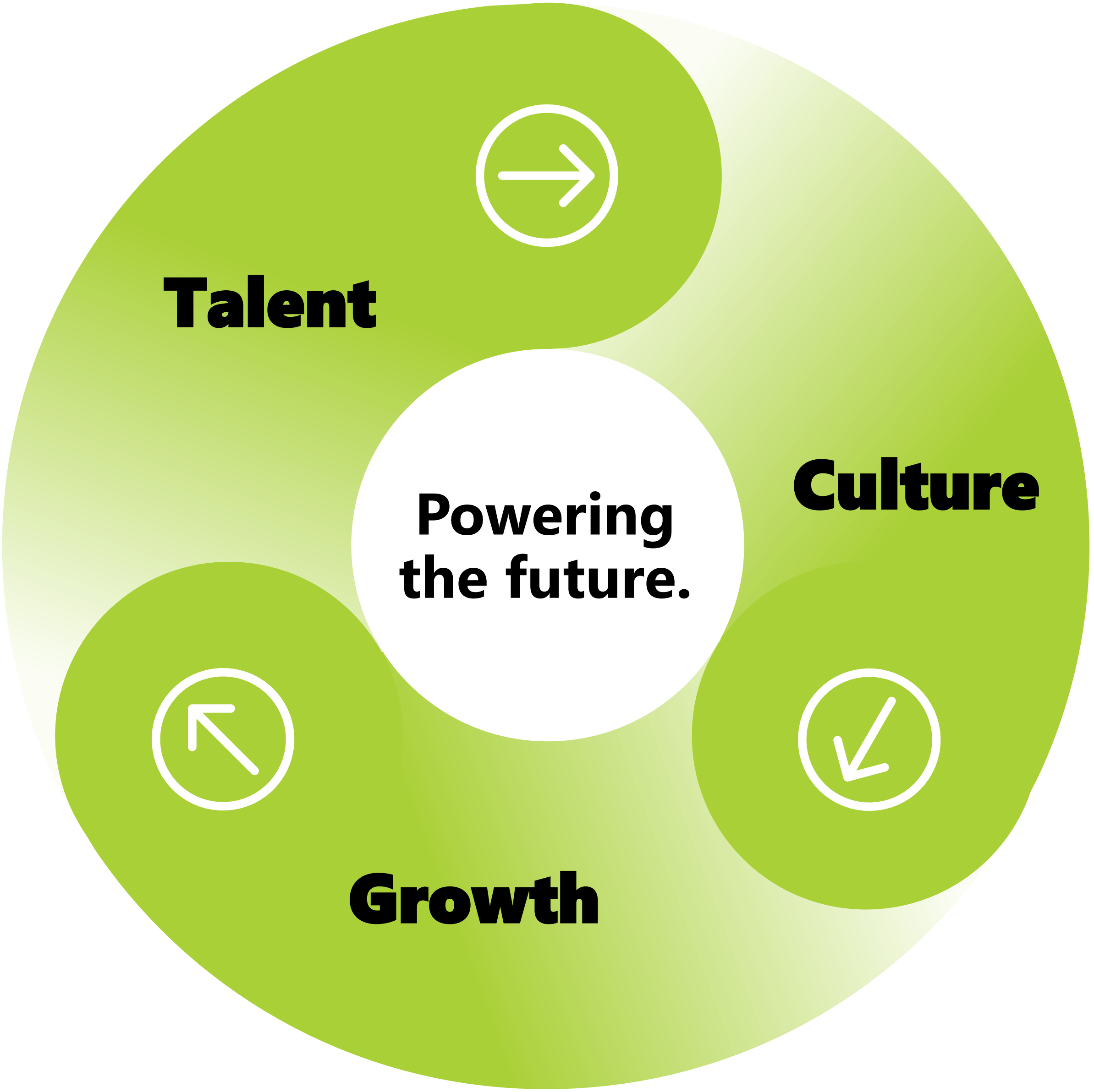




Source: 2023 S&P Global Market Intelligence analysis

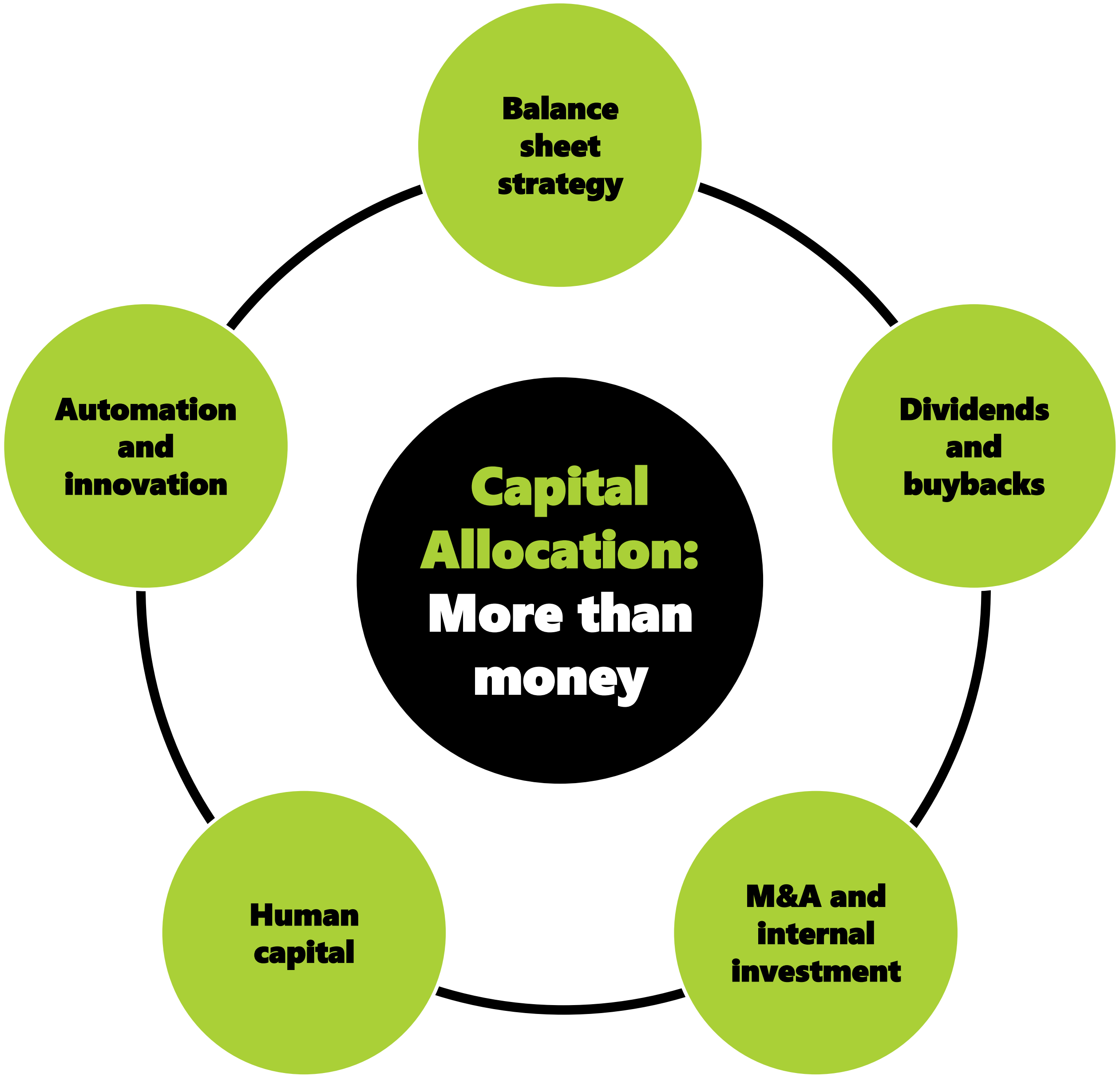


Capitalize on existing strengths



Expand initiatives that drive operational gains

Smart use of capital against growth opportunities



AI risks and opportunities… let’s talk about it

Questions?