



SEI Investments Company

Annual Meeting of Shareholders

Wednesday, June 1, 2022 9 a.m. ET

SEI Investments Company

Annual Meeting of Shareholders

Code of
Conduct.



Code of Conduct.

In order to use the time of all attendees as effectively as possible, we will handle the business of the meeting as outlined on the Agenda. In the interest of conducting an orderly meeting within a reasonable time period, we ask for your cooperation in observing the following mandatory code of conduct governing attendance and participation.

1. Subject to the discretion of the Chairman of the Meeting, the Annual Meeting will follow the Agenda that is available to you on the virtual meeting site.
2. As this is a meeting of our shareholders, only shareholders as of the close of business on March 25, 2022, the record date, or their duly authorized proxies, are entitled to participate in the Annual Meeting, including to vote or submit questions.
3. If you have submitted your proxy prior to the start of the Annual Meeting, your vote has been received, and there is no need to vote those shares again during the Annual Meeting, unless you wish to revoke or change your vote. If you have not voted by proxy, or if you wish to change your vote, you may do so by clicking on the voting button on the web portal and following the instructions.
4. Shareholders were provided the opportunity to submit questions in advance of the Annual Meeting and will be able to do so during the Annual Meeting. We will only respond to questions during the Question and Answer portion of the meeting. We will only take questions that are asked by shareholders of record as of the close of business on March 25, 2022 that are related to the official business of the meeting. When submitting a question or comment through the virtual meeting portal, please include your name, your status as a shareholder or proxy holder, and your organization (if applicable), along with the text of your question.
5. To allow us to answer questions from as many shareholders as possible, we will limit each shareholder to one question. Each response will be limited to two minutes. We reserve the right to edit inappropriate language. Questions from multiple shareholders on the same topic or that are otherwise related, may be grouped, summarized, and answered together.



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6. We welcome the views and constructive comments of our shareholders, but in fairness to all shareholders in attendance, the Annual Meeting's purpose will be observed. As noted above, we will only respond to questions related to the official business of the meeting. The Chairman, General Counsel, or Corporate Secretary do not intend to address questions or comments that in their judgment are, among other things:

- Irrelevant to the business of the Company or to the business of the annual meeting;
- Derogatory in nature, or related to personal matters or personal grievances;
- Unduly prolonged; or
- In substance, repetitious of statements made by other shareholders.

The determination as to whether a question is out of order or not otherwise suitable for the business of the Annual Meeting will be determined by any of the Chairman, General Counsel, or Corporate Secretary in their reasonable judgment.

7. In the event of a technical difficulty or other disruption that interferes with the ability to continue the Annual Meeting, the Chairman may adjourn, recess, or expedite the meeting or take such other action that the Chairman determines to be appropriate under the circumstances. Updates regarding the Annual Meeting will be available on the Investor Relations website at seic.com/investor-relations.

8. Recording of the Annual Meeting is prohibited.

Thank you for your cooperation and for joining us at the Annual Meeting.



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Cautionary
notice
regarding
forward-looking
statements.



Cautionary notice regarding forward-looking statements.

We would like to remind you that many of our comments during today's meeting are forward-looking statements. These forward-looking statements are based upon judgments and assumptions that involve risks. In some cases you can identify forward-looking statements by terminology such as "should," "may," "will," "expect," "believe," "continue" or "appear." Our forward-looking statements include our expectations as to:

- the long-term consequences of, and potential opportunities resulting from, the disruptions precipitated by the COVID-19 pandemic,
- the degree to which we will benefit from our scale, resources, technology and infrastructure,
- our resource allocations and the technologies and platforms in which we will choose to invest,
- the strategic initiatives that we will pursue;
- the benefits we will derive from our investments and our ability to monetize these investments,
- the strength of our pipelines and growth opportunities, and
- our ability to execute on, and the success of, our strategic objectives.

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 December 31, 2021, filed with the Securities and Exchange Commission and available on our website at <https://www.seic.com/investor-relations> and on the Securities and Exchange Commission's website (www.sec.gov). There may be additional risks that we do not presently know or that we currently believe are immaterial which could also cause actual results to differ from those contained in our forward-looking statements. We do not undertake to update the forward-looking statements to reflect the impact of circumstances or events that may arise after the date of the forward-looking statements.



Thank you.

