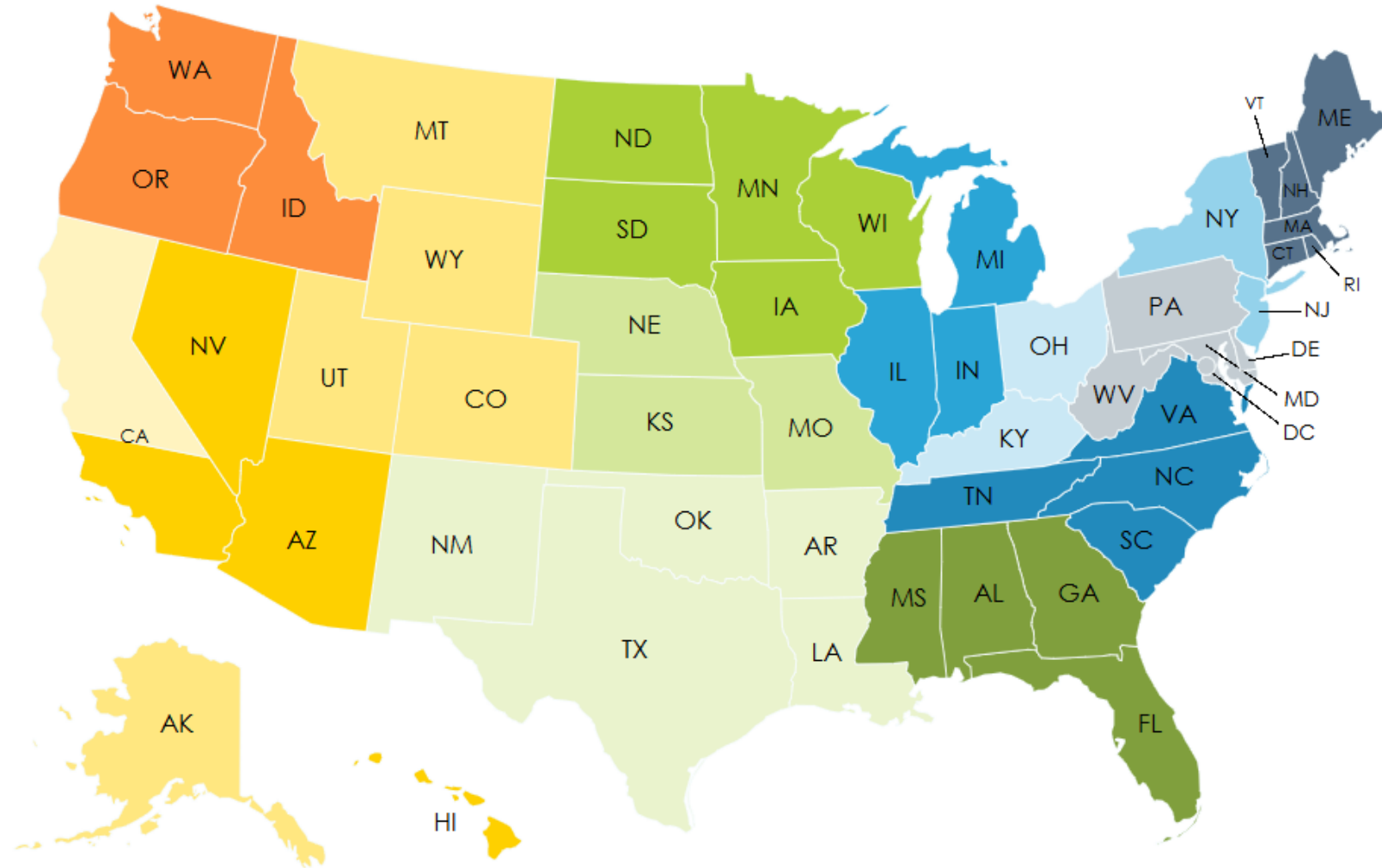


# Independent Broker/Dealer-affiliated advisors

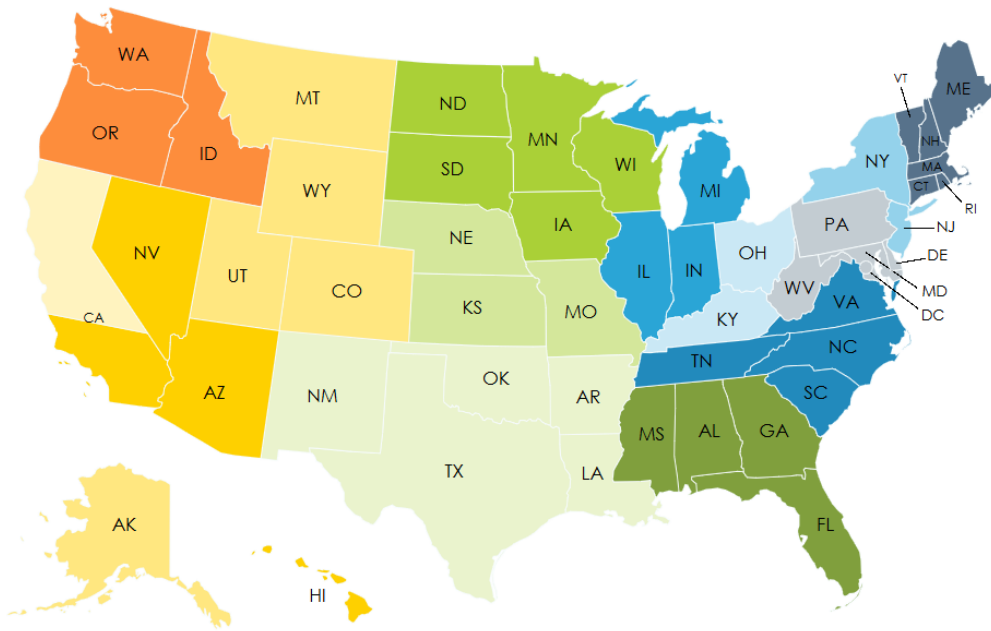
Regions, territories and dedicated business development teams.



As of April 1, 2026.

# Independent Broker/Dealer-affiliated advisors

## Regions, territories and dedicated business development teams.



		New Client Team	Existing Client Teams	
Region	Territory States	Business Development Director	Senior Relationship Manager	Relationship Manager
East	CT, MA, ME, NH, RI, VT	<b>Ben Packer</b> 610-676-2391 <a href="mailto:bpacker@seic.com">bpacker@seic.com</a>	<b>Geoff Knox</b> 610-676-2529 <a href="mailto:gknox@seic.com">gknox@seic.com</a>	<b>Tim Heagy</b> 610-676-3532 <a href="mailto:theagy@seic.com">theagy@seic.com</a>
	NJ, NY	<b>John Loughlin</b> 610-676-3650 <a href="mailto:jloughlin@seic.com">jloughlin@seic.com</a>	<b>Bill Berberich, CFP®</b> 610-676-2468 <a href="mailto:wberberich@seic.com">wberberich@seic.com</a>	
	NC, SC, TN, VA	<b>Greg Painter, AIF®</b> 610-676-3539 <a href="mailto:gpainter@seic.com">gpainter@seic.com</a>	<b>Tom Pileggi</b> 610-676-3301 <a href="mailto:tpileggi@seic.com">tpileggi@seic.com</a>  <i>*Andrew Roth covers IL</i>	
	IL*, IN, MI	<b>Jake Norton</b> 610-676-2099 <a href="mailto:jxnorton@seic.com">jxnorton@seic.com</a>		
	KY, OH	<b>Connor Millay</b> 610-676-5178 <a href="mailto:cmillay@seic.com">cmillay@seic.com</a>	<b>Andrew Chipego</b> 610-676-4516 <a href="mailto:achiago@seic.com">achiago@seic.com</a>	<b>Jake Flannery</b> 610-676-4903 <a href="mailto:jflannery@seic.com">jflannery@seic.com</a>  <i>*Sam Stroud covers IL</i>
	DC, DE, MD, PA, WV	<b>Alex DeCiantis, CFP®</b> 610-676-5406 <a href="mailto:adeciantis@seic.com">adeciantis@seic.com</a>		
West	IA, MN, ND, SD, WI	<b>Tyler Magie, CIMA®</b> 501-652-0368 <a href="mailto:tmagie@seic.com">tmagie@seic.com</a>	<b>Andrew Roth</b> 610-676-4898 <a href="mailto:aroth@seic.com">aroth@seic.com</a>  <i>*Also covers IL</i>	<b>Sam Stroud</b> 610-676-7969 <a href="mailto:sstroud@seic.com">sstroud@seic.com</a>  <i>*Also covers IL</i>
	KS, MO, NE	<b>Nate Poole</b> 610-676-4607 <a href="mailto:npoole@seic.com">npool@seic.com</a>		
	AR, LA, OK, NM, TX	<b>Tyler Cashiola</b> 610-676-5571 <a href="mailto:tcashiola@seic.com">tcashiola@seic.com</a>		
	AL, FL, GA, MS*	<b>Shedrick Crawford</b> 610-676-4678 <a href="mailto:scrawford@seic.com">scrawford@seic.com</a>	<b>Brian Barone</b> 610-676-4600 <a href="mailto:bbarone@seic.com">bbarone@seic.com</a>	<b>Austin Paxton</b> 610-676-3116 <a href="mailto:apaxton@seic.com">apaxton@seic.com</a>  <i>*Tatiana Paravela covers CA</i>
	AK, CO, MT, UT, WY	<b>Tigran Muradyan</b> 303-358-5858 <a href="mailto:tmuradyan@seic.com">tmuradyan@seic.com</a>	<b>Luke Arizin</b> 610-676-3914 <a href="mailto:larizin@seic.com">larizin@seic.com</a>  <i>*Rob Kelly covers CA</i>	
	ID, OR, WA	<b>Eric Tollefson</b> 610-676-4333 <a href="mailto:etollefson@seic.com">etollefson@seic.com</a>		
	CA (North)*	<b>Drew Waters</b> 916-203-1353 <a href="mailto:dwaters1@seic.com">dwaters1@seic.com</a>		
	CA (South), AZ, HI, NV, GU	<b>Jim Agasar, BFA™</b> 215-801-2273 <a href="mailto:jagasar@seic.com">jagasar@seic.com</a>	<b>Rob Kelly, CFP®</b> 610-676-4515 <a href="mailto:rjkelly@seic.com">rjkelly@seic.com</a>  <i>*Also covers CA (North)</i>	<b>Tatiana Paravela</b> 610-676-3497 <a href="mailto:tparavela@seic.com">tparavela@seic.com</a>  <i>*Also covers CA (North)</i>



As of April 1, 2026.

# Independent Broker/Dealer-affiliated advisors

## Regions, territories and dedicated business development teams.



Region	Territory States	New Client Team		Existing Client Teams		
		Business Development Director	Account Executive	Senior Relationship Manager	Account Executive	Relationship Manager
East	CT, MA, ME, NH, RI, VT	<b>Ben Packer</b> 610-676-2391 <a href="mailto:bpacker@seic.com">bpacker@seic.com</a>	<b>Paul Kokol</b> 610-676-4819 <a href="mailto:pkokol1@seic.com">pkokol1@seic.com</a>	<b>Geoff Knox</b> 610-676-2529 <a href="mailto:gknox@seic.com">gknox@seic.com</a>	<b>Matt Pesot</b> 610-676-2926 <a href="mailto:mpesot@seic.com">mpesot@seic.com</a>	<b>Tim Heagy</b> 610-676-3532 <a href="mailto:theagy@seic.com">theagy@seic.com</a>
	NJ, NY	<b>John Loughlin</b> 610-676-3650 <a href="mailto:jloughlin@seic.com">jloughlin@seic.com</a>	<b>Paul Kokol</b> 610-676-4819 <a href="mailto:pkokol1@seic.com">pkokol1@seic.com</a>	<b>Bill Berberich, CFP®</b> 610-676-2468 <a href="mailto:wberberich@seic.com">wberberich@seic.com</a>	<b>Madeline Russell</b> 610-676-4945 <a href="mailto:mrussell1@seic.com">mrussell1@seic.com</a>	
	NC, SC, TN, VA	<b>Greg Painter, AIF®</b> 610-676-3539 <a href="mailto:gpainter@seic.com">gpainter@seic.com</a>	<b>J.T. Spina</b> 610-676-3118 <a href="mailto:jspina@seic.com">jspina@seic.com</a>	<b>Tom Pileggi</b> 610-676-3301 <a href="mailto:tpileggi@seic.com">tpileggi@seic.com</a>  <i>*Andrew Roth covers IL</i>	<b>Ryan Cavanagh, CFP®</b> 610-676-7312 <a href="mailto:rcavanagh1@seic.com">rcavanagh1@seic.com</a>	
	IL*, IN, MI	<b>Jake Norton</b> 610-676-2099 <a href="mailto:jxnorton@seic.com">jxnorton@seic.com</a>	<b>Keith Carra, CFP®</b> 610-676-3668 <a href="mailto:kcarra1@seic.com">kcarra1@seic.com</a>			<b>Jake Flannery</b> 610-676-4903 <a href="mailto:jflannery@seic.com">jflannery@seic.com</a>
	KY, OH	<b>Connor Millay</b> 610-676-5178 <a href="mailto:cmillay@seic.com">cmillay@seic.com</a>	<b>Kristin Conlon</b> 610-676-5123 <a href="mailto:kconlon@seic.com">kconlon@seic.com</a>			
	DC, DE, MD, PA, WV	<b>Alex DeCiantis, CFP®</b> 610-676-5406 <a href="mailto:adeciantis@seic.com">adeciantis@seic.com</a>	<b>Adam Booz, CFP®</b> 610-676-2331 <a href="mailto:abooz@seic.com">abooz@seic.com</a>	<b>Andrew Chipego</b> 610-676-4516 <a href="mailto:achipego@seic.com">achipego@seic.com</a>	<b>Alex Cohen</b> 610-676-1057 <a href="mailto:acohen@seic.com">acohen@seic.com</a>	
West	IA, MN, ND, SD, WI	<b>Tyler Magie, CIMA®</b> 501-652-0368 <a href="mailto:tmagie@seic.com">tmagie@seic.com</a>	<b>Hayden Greer, CFP®</b> 610-676-4837 <a href="mailto:hgreer@seic.com">hgreer@seic.com</a>	<b>Andrew Roth</b> 610-676-4898 <a href="mailto:aroth@seic.com">aroth@seic.com</a>  <i>*Also covers IL</i>	<b>Andrew Humphrey</b> 610-676-2550 <a href="mailto:ahumphrey@seic.com">ahumphrey@seic.com</a>	<b>Sam Stroud</b> 610-676-7969 <a href="mailto:sstroud@seic.com">sstroud@seic.com</a>  <i>*Also covers IL</i>
	KS, MO, NE	<b>Nate Poole</b> 610-676-4607 <a href="mailto:npoole@seic.com">npoole@seic.com</a>	<b>Hayden Greer, CFP®</b> 610-676-4837 <a href="mailto:hgreer@seic.com">hgreer@seic.com</a>		<b>Zachary Button</b> 610-676-1412 <a href="mailto:zbutton@seic.com">zbutton@seic.com</a>	
	AR, LA, OK, NM, TX	<b>Tyler Cashiola</b> 610-676-5571 <a href="mailto:tcashiola@seic.com">tcashiola@seic.com</a>	<b>Brendan Smith</b> 610-676-3036 <a href="mailto:bsmith3@seic.com">bsmith3@seic.com</a>			<b>Nick Hoffman</b> 610-676-5488 <a href="mailto:nhoffman@seic.com">nhoffman@seic.com</a>
	AL, FL, GA, MS	<b>Shedrick Crawford</b> 610-676-4678 <a href="mailto:scrawford@seic.com">scrawford@seic.com</a>	<b>Joe De Los Santos Morris</b> 610-676-5445 <a href="mailto:jdelossantosmorris@seic.com">jdelossantosmorris@seic.com</a>	<b>Brian Barone</b> 610-676-4600 <a href="mailto:bbarone@seic.com">bbarone@seic.com</a>	<b>Austin Paxton</b> 610-676-3116 <a href="mailto:apaxton@seic.com">apaxton@seic.com</a>  <i>*Tatiana Paravela covers CA</i>	
	AK, CO, MT, UT, WY	<b>Tigran Muradyan</b> 303-358-5858 <a href="mailto:tmuradyan@seic.com">tmuradyan@seic.com</a>	<b>Nick Marchegiano</b> 610-676-5271 <a href="mailto:nmarchegiano@seic.com">nmarchegiano@seic.com</a>	<b>Luke Arizin</b> 610-676-3914 <a href="mailto:larizin@seic.com">larizin@seic.com</a>  <i>*Rob Kelly covers CA</i>		<b>Joe McLaughlin</b> 610-676-4804 <a href="mailto:jmclaughlin@seic.com">jmclaughlin@seic.com</a>
	ID, OR, WA	<b>Eric Tollefson</b> 610-676-4333 <a href="mailto:etollefson@seic.com">etollefson@seic.com</a>	<b>Brendan Smith</b> 610-676-3036 <a href="mailto:bsmith3@seic.com">bsmith3@seic.com</a>			
	CA (North)*	<b>Drew Waters</b> 916-203-1353 <a href="mailto:dwaters1@seic.com">dwaters1@seic.com</a>	<b>Jim Toner</b> 610-676-3596 <a href="mailto:jtoner@seic.com">jtoner@seic.com</a>			
	CA (South), AZ, HI, NV, GU	<b>Jim Agasar, BFA™</b> 215-801-2273 <a href="mailto:jagasar@seic.com">jagasar@seic.com</a>	<b>Jim Toner</b> 610-676-3596 <a href="mailto:jtoner@seic.com">jtoner@seic.com</a>	<b>Rob Kelly, CFP®</b> 610-676-4515 <a href="mailto:rkelly@seic.com">rkelly@seic.com</a>  <i>*Also covers CA (North)</i>		<b>Joe Kelly</b> 610-676-2481 <a href="mailto:jkelly@seic.com">jkelly@seic.com</a>

As of April 1, 2026.

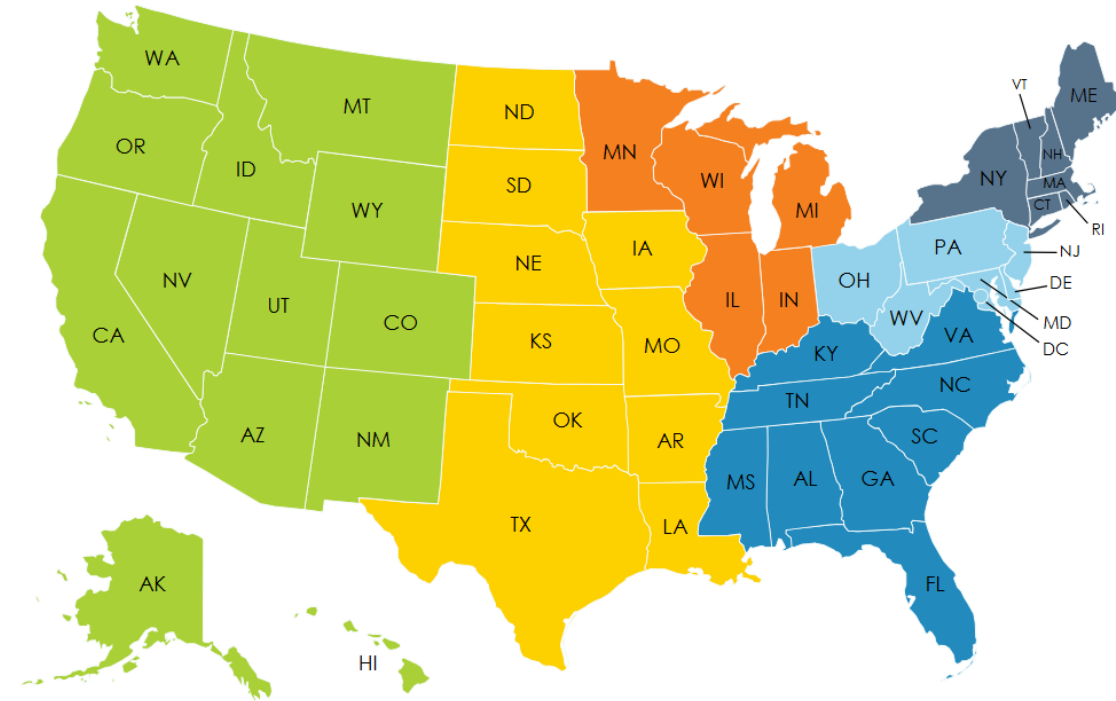


# Independent RIAs and Hybrid RIAs

Regions, territories and dedicated teams: New Client Team.



Leadership Team	
<p><b>Gabriel Garcia</b> Managing Director, Head of RIA Channel <i>RIA Strategy &amp; Client Experience</i> 610-676-2075   <a href="mailto:ggarcia@seic.com">ggarcia@seic.com</a></p>	<p><b>Harley Nager, CFP®</b> Managing Director <i>RIA Client Experience</i> 610-676-2036   <a href="mailto:hnager@seic.com">hnager@seic.com</a></p>



Territory	States	New Client Team: RIA	
		Business Development Director	Client Experience Associate
Northeast RIA	CT, MA, ME, NH, NY, RI, VT	<p><b>Nick Dodds</b> 610-676-2585 <a href="mailto:ndodds@seic.com">ndodds@seic.com</a></p>	<p><b>Patrick Troy</b> 610-676-7597 <a href="mailto:ptroy1@seic.com">ptroy1@seic.com</a></p>
Mid-Atlantic RIA	DC, DE, MD, NJ, OH, PA, WV	<p><b>Eric Dunn</b> 610-676-3434 <a href="mailto:edunn@seic.com">edunn@seic.com</a></p>	<p><b>Zach Kovatch</b> 610-676-1309 <a href="mailto:zkovatch@seic.com">zkovatch@seic.com</a></p>
Southeast RIA	AL, FL, GA, KY, MS, NC, PR, SC, TN, VA	<p><b>Kevin Brandenburg</b> 610-676-2013 <a href="mailto:kbrandenburg@seic.com">kbrandenburg@seic.com</a></p>	<p><b>Bobby Jones</b> 610-676-1091 <a href="mailto:rjones1@seic.com">rjones1@seic.com</a></p>
Great Lakes RIA	IL, IN, MI, MN, WI	<p><b>Mark Mizzer, CFP®</b> 610-676-4209 <a href="mailto:mmizzer@seic.com">mmizzer@seic.com</a></p>	<p><b>Thomas Kutufaris</b> 610-676-5242 <a href="mailto:tkutufaris@seic.com">tkutufaris@seic.com</a></p>
Central RIA	AR, IA, KS, LA, MO, ND, NE, OK, SD, TX	<p><b>OPEN</b></p>	<p><b>Thomas Kutufaris</b> 610-676-5242 <a href="mailto:tkutufaris@seic.com">tkutufaris@seic.com</a></p>
West RIA	AK, AZ, CA, CO, HI, ID, MT, NV, NM, OR, UT, WA, WY	<p><b>Clayton Johnson</b> 702-306-7277 <a href="mailto:cjohnson1@seic.com">cjohnson1@seic.com</a></p>	<p><b>Bobby Jones</b> 610-676-1091 <a href="mailto:rjones1@seic.com">rjones1@seic.com</a></p>
<p><b>Andrew Quintois</b>, Client Implementation Specialist 610-676-2113   <a href="mailto:aquintois@seic.com">aquintois@seic.com</a></p>			



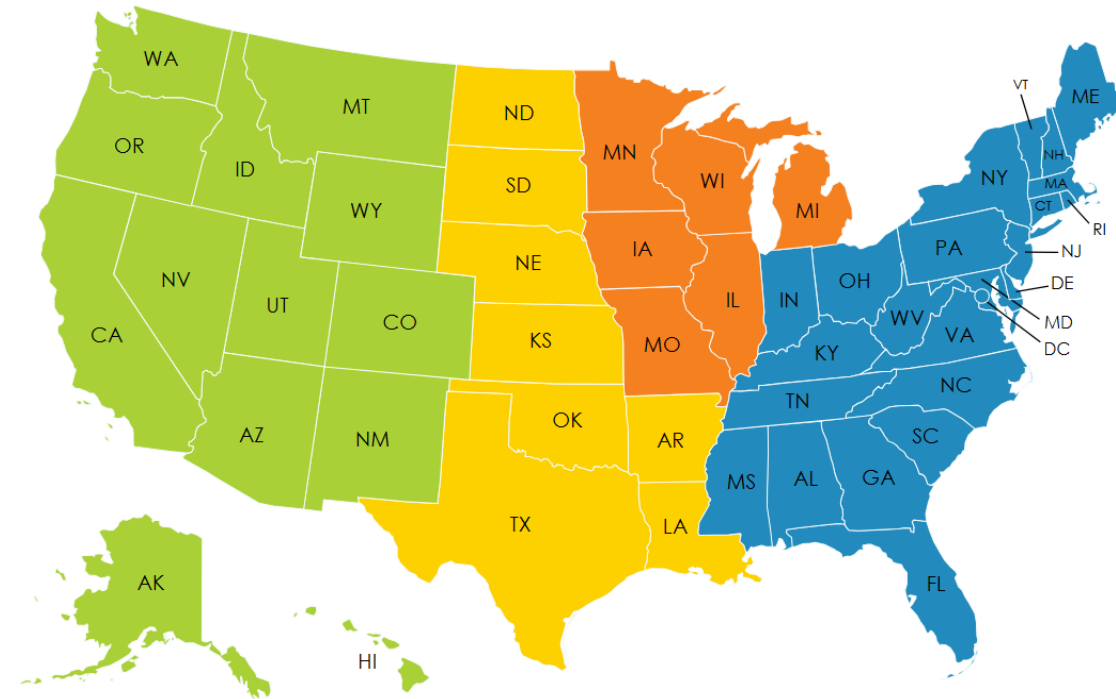
As of April 1, 2026.

# Independent RIAs and Hybrid RIAs

Regions, territories and dedicated teams: Strategic Client Team.



Leadership Team	
<p><b>Gabriel Garcia</b>                      Managing Director, Head of RIA Channel  <i>RIA Strategy &amp; Client Experience</i>                      610-676-2075   <a href="mailto:ggarcia@seic.com">ggarcia@seic.com</a></p>	<p><b>Harley Nager, CFP®</b>                      Managing Director  <i>RIA Client Experience</i>                      610-676-2036   <a href="mailto:hnager@seic.com">hnager@seic.com</a></p>



		Strategic Client Team: RIA	
Territory	States	Senior Relationship Manager	Client Experience Associate
East RIA	AL, CT, DC, DE, FL, GA, IN, KY, MA, MD, ME, MS, NH, NC, NJ, NY, OH, PA, PR, SC, TN, VA, WV	<p><b>Thomas Murray</b>                      610-676-3631  <a href="mailto:tmurray@seic.com">tmurray@seic.com</a></p>	<p><b>Ryan Bivenour</b>                      610-676-5515  <a href="mailto:rbivenour@seic.com">rbivenour@seic.com</a></p>
Great Lakes RIA	IA, IL, MI, MN, MO, WI	<p><b>Michael Harris, JD, MBA, CFP®</b>                      610-676-4978  <a href="mailto:mjharris@seic.com">mjharris@seic.com</a></p>	<p><b>Larissa Noble</b>                      610-676-1589  <a href="mailto:lnoble@seic.com">lnoble@seic.com</a></p>
Central RIA	AR, KS, LA, ND, NE, OK, SD, TX	<p><b>Jim Faunce, CFP®</b>                      610-676-3179  <a href="mailto:jfaunce@seic.com">jfaunce@seic.com</a></p>	<p><b>Natasha Patel</b>                      610-676-3135  <a href="mailto:npatel2@seic.com">npatel2@seic.com</a></p>
West RIA	AK, AZ, CA, CO, HI, ID, MT, NV, NM, OR, UT, WA, WY	<p><b>Michelle Rohrbach</b>                      610-676-2608  <a href="mailto:mrohrbach@seic.com">mrohrbach@seic.com</a></p>	<p><b>Eric Martinez</b>                      610-676-4108  <a href="mailto:emartinez@seic.com">emartinez@seic.com</a></p>
		<p><b>Andrew Quintois, Client Implementation Specialist</b>                      610-676-2113   <a href="mailto:aquintois@seic.com">aquintois@seic.com</a></p>	



As of April 1, 2026.

# U.S. Wealth and Advisor Client Team

## An extension of your business development teams.



### Sales & Client Team Leadership

**Steven Miller, CFP®**

Managing Director, *IBD Channel*  
610-676-3624 / [smiller@seic.com](mailto:smiller@seic.com)

**Frank Byrd**

Senior Director, *New Client Team (IBD Channel)*  
610-676-1523 / [fbyrd@seic.com](mailto:fbyrd@seic.com)

**Chris Arizin**

Senior Director, *East Region Client Team (IBD Channel)*  
610-676-2833 / [carizin@seic.com](mailto:carizin@seic.com)

**Bill Berberich, CFP®**

Senior Director, *West Region Client Team (IBD Channel)*  
610-676-2468 / [wberberich@seic.com](mailto:wberberich@seic.com)

**Gabriel Garcia**

Managing Director, *RIA Channel*  
610-676-2075 / [ggarcia@seic.com](mailto:ggarcia@seic.com)

**Harley Nager, CFP®**

Senior Director, *RIA Strategy & Client Experience*  
610-676-2036 / [hnager@seic.com](mailto:hnager@seic.com)

**Brendan McCabe**

Director, *Inside Sales*  
610-676-4558 / [bmccabe@seic.com](mailto:bmccabe@seic.com)

**National Accounts Team**

[AdvisorNationalAccountsTeam@seic.com](mailto:AdvisorNationalAccountsTeam@seic.com)

**Mike Matkovic**

Senior Director, *National Accounts Team*  
610-676-2326 / [mmatkovic@seic.com](mailto:mmatkovic@seic.com)

**Practice Management Team**

[AdvisorServicesTeam@seic.com](mailto:AdvisorServicesTeam@seic.com)

**Sauna Mace, CHPCTM**

Senior Director, *Advisor Services and Practice Management*  
802-598-7394 / [smace@seic.com](mailto:smace@seic.com)

**Client Service Team****Becky Barker**

Senior Director, *Client Service Team*  
610-676-4267 / [rbarker@seic.com](mailto:rbarker@seic.com)

**Client Enablement Team****Chris Rice**

Senior Director, *Client Enablement*  
610-676-1228 / [crice@seic.com](mailto:crice@seic.com)

**Mike Coccia**

Director, *Business Transitions*  
610-676-3963 / [mcoccia@seic.com](mailto:mcoccia@seic.com)

**Samantha Bixler**

Director, *Platform Adoption and Education*  
610-676-4241 / [sbixler@seic.com](mailto:sbixler@seic.com)

We simplify the complex to elevate advice.

Our capabilities include:

**Flexible investment solutions**

Benefit from in-house expertise combined with premier asset managers to help you deliver personalized investment solutions at scale.

**Powerful technology**

Leverage a unified platform that powers some of the industry's largest banks and institutions.

**Integrated custody**

It isn't just a component of our platform—it's the built-in foundation that powers everything we do.

**Actionable advisor services**

Elevate your firm with actionable practice management and learn how to think like a business consultant.

We provide an integrated technology, custody, and investment infrastructure designed to help you scale your business and focus on your clients.



Information provided by SEI Investments Management Corporation (SIMC), a wholly-owned subsidiary of SEI Investments Company (SEI). The Investment Management Unit (IMU) is a team within SIMC. There are risks involved with investing, including loss of principal. Technology services provided by SEI Global Services, Inc. (SGS). SGS is a wholly-owned subsidiary of SEI. Custody Services provided by SEI Private Trust Company (SPTC), a federally-chartered limited purpose savings association and wholly-owned subsidiary of SEI. Michael Harris does not represent SEI or any of its subsidiaries in a legal capacity.  
As of April 1, 2026.