

Clermont Trust USA Goes Live on the SEI Wealth Platform

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SEI Introduces Streamlined Implementation Model and Scalable Platform for Community Banks and Trust Companies

OAKS, Pa., Oct. 29, 2025 /PRNewswire/ -- [SEI](#)® (NASDAQ:[SEIC](#)) today announced that Clermont Trust USA, an independent trust company serving family offices and high-net-worth individuals globally, is live on the SEI Wealth PlatformSM (SWP), leveraging an optimized configuration of SWP and a streamlined implementation model designed for regional and community banks and trust companies managing less than \$1 billion in assets.

Commenting on the strategic partnership, Bob Hogan, President and CEO of Clermont Trust USA, said:

"We're committed to delivering highly customized trust and advice solutions that combine our team's deep fiduciary experience with the flexibility and high-level service our clients deserve. Whether it's navigating complex wealth needs, adapting to a changing regulatory environment, or streamlining front-to-back-office operations, we know these challenges can only be solved with scalable, integrated solutions.

"The SEI Wealth Platform gives us a powerful, end-to-end infrastructure and a broad set of capabilities that can grow alongside our business, helping us meet client needs quickly and at scale. SEI's tailored implementation approach made it possible for us to get up and running fast, with little to no disruption across our business operations. As we work to deliver a more unified trust and wealth experience for our clients, SEI's solutions and in-depth industry expertise give us the flexibility and scale to fuel our future growth."

The streamlined SWP configuration is designed to offer community banks and trust companies a comprehensive suite of services and capabilities and inherent access to SEI's asset management offering. The solution can be implemented on a condensed implementation timeline, allowing firms to swiftly transfer assets, enhance their technology and user experience, and gain operational efficiency. SEI's trust accounting and wealth management ecosystem of solutions for community banks and trust companies includes:

- Direct access to SEI's tailored investment strategies and sophisticated asset management tools to support them
- An end-client portal and advisor views for transparent, interactive access to customers' financial information

- Advanced reporting and analytics tools that deliver critical wealth insights
- Comprehensive business process outsourcing
- Add-on platform services and on-demand access to industry expertise to support scale and growth

Sanjay Sharma, Global Head of SEI's Private Banking business, added:

"Serving trust companies and regional and community banks has been integral to our business for more than 55 years, and we understand the increasing challenges they face in a dynamic and competitive wealth management landscape. They are seeking greater access to asset management solutions in addition to cost-effective, modern solutions that replace inefficient legacy systems. However, access to robust, integrated platforms has largely been impeded by soaring technology costs and complex implementation models that cater to the larger end of the market.

"We developed this streamlined technology and implementation model with a focus on speed to market and flexibility to reduce costs. A scalable, open-for-business foundation gives our clients ongoing access to the benefits of the SEI Wealth Platform's advanced infrastructure alongside the breadth of our technology, operations, and asset management capabilities. The model enables us to be a true strategic partner to clients like Clermont Trust USA, and we look forward to continuing to support their growth journey."

As of December 31, 2024, SEI has approximately \$7.1 trillion in assets on SEI's wealth management platforms, with \$1.3 trillion in assets on SEI Wealth Platform (SWP) and \$1.1 trillion in assets custodied with SEI Private Trust Company (SPTC).

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 September 30, 2025, SEI manages, advises, or administers approximately \$1.8 trillion in assets. For more information, visit [seic.com](#).

About the SEI Wealth PlatformSM

The SEI Wealth Platform (the Platform) is an outsourcing solution for wealth managers encompassing wealth processing services and wealth management programs, combined with business process expertise. With the Platform, SEI provides wealth management organizations with the infrastructure, operations, and administrative support necessary to capitalize on their strategic objectives in a constantly shifting market. For more information, visit [seic.com/wealthplatform](#).

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