



LibertyFi Celebrates 5 Years and \$12B AUA

Fintech and operations consultant drives sustained, rapid growth

Birmingham, AL – July 12, 2022 – [LibertyFi](#), a technology and operations consultancy that helps growth-oriented Registered Investment Advisors (RIA) drive revenue and scale their businesses using technology, today announced that the company serves 24 clients and has \$12 billion in assets under administration (AUA) on Envestnet's enterprise platform. The company has averaged 42% year-over-year revenue growth and maintains a 98% client satisfaction rating, highlighting the effectiveness of its value proposition and superior client service.

By enabling advisors to focus on serving clients, LibertyFi helps growth-oriented RIAs drive revenue and scale their practices. With its deep technical experience, the company's personalized consulting services include evaluating client business processes and their supporting technologies, implementing the Envestnet platform, streamlining operations, and providing middle-office support.

To accelerate the benefits a firm will realize through its use of the Envestnet platform, LibertyFi provides tailored onboarding and platform implementation, and delivers ongoing support to help its clients deliver exceptional customer experiences.

"As we celebrate five years of helping RIAs grow their practices and deliver superior client experiences, we want to take a moment to say 'thank you' to our clients for supporting us," said **Alli Jordan, President & COO, LibertyFi**. "In our work serving RIAs using the Envestnet platform, we are empowering them to expand their definition of advice to address their clients' entire financial lives."

"Today's advisors constantly need to do more—provide more holistic service for more clients. Rather than immediately adding headcount to do more, RIAs within the LibertyFi network have realized a better way: using technology and embracing outsourcing," said **John Phoenix, Partner at Wealth Advisor Growth Network**. "Firms that outsource back office operations to LibertyFi have more time to focus on client-facing activities, and grow faster than those that don't."

LibertyFi helps RIAs maximize their investment in transformative advisor technology by providing an experienced team of hands-on consultants and coaches. Through these interactive and sustained partnerships, the company is committed to helping each firm progress towards its strategic vision.

For more information, please visit: www.libertyfi.com.

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About LibertyFi

LibertyFi has deep experience helping growth-oriented RIAs drive revenue and scale their businesses with the Envestnet unified advice platform of integrated solutions. Its personalized consulting services include evaluating clients' business processes and their supporting technologies, implementing the Envestnet platform, streamlining operations, and providing middle-office support. To learn more about LibertyFi, please visit: www.libertyfi.com.

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