



## **LibertyFi Announces the Promotion of Alli Jordan to President & COO**

**Thursday, June 23, 2022** - LibertyFi announced today the promotion of Alli Jordan to President and COO of LibertyFi. As a co-founder of LibertyFi, Alli has been running the company on a day-to-day basis since its founding five years ago and has been instrumental in growing LibertyFi's client base to 24 RIAs and \$12B in assets under administration (AUA).

Alli is responsible for recruiting and maintaining a culture that rewards teamwork and communication. Alli also manages business development, daily operations, client satisfaction, relationships with strategic partners, and service escalations.

"I'm incredibly proud to recognize Alli as the President and COO of LibertyFi. She leads a very seasoned team of professionals by demanding more of herself than others. As a result, she enjoys immense loyalty from colleagues and clients alike," said Trey Ruch, CEO of LibertyFi.

An advocate for women in the financial services industry, Alli shares her knowledge of finance through Wealth Edit and has served as a mentor with Envestnet Institute On Campus Women in Wealth Management. She also hosts the podcast series called *Secrets to Scale* to help growth-oriented RIAs scale their practices.

[Click here](#) to connect with Alli on LinkedIn.