

## **LibertyFi Grows to Over \$7.5B AUA in Three Years** *Fintech and operations consultant drives sustained, rapid growth*

**Birmingham, AL July 20, 2020** – [LibertyFi](#), a technology and operations consultancy committed to helping growth-oriented RIAs drive revenue and scale their businesses with the Envestnet unified advice platform and integrated solutions, today announced that the company now serves 21 clients and has \$7.5 billion in assets under administration (AUA) on their enterprise platform. Since 2018, the company has increased AUA by \$4 billion. This growth highlights RIA demand for dedicated expertise in conforming technology to streamline key business operations.

LibertyFi helps growth-oriented RIAs drive revenue and scale their practices by enabling advisors to focus on what they do best: serving clients. 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 client 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.

"Technology plays an increasingly important role in driving RIA success because it largely defines the client experience, from setting goals to creating financial plans and managing portfolios," said **LibertyFi CEO Trey Ruch**. "The most successful firms use technology to create and streamline repeatable processes that provide advisors and clients with consistent experiences. To get the most from their investments in technology, advisory firms often need help deploying, configuring, and maintaining these important systems."

One LibertyFi client, Rehmann Wealth, is an advisory firm with almost \$2 billion in assets under LibertyFi's administration. By optimizing the firm's use of the Envestnet platform, LibertyFi has helped its team of 28 financial advisors spend more time serving investors.

**Amy Flourry, Director of Operation at Rehmann Wealth**, said, "Once we partnered with LibertyFi, our advisors almost immediately started sharing really positive feedback about how they were more productive and happier because LibertyFi simplified our processes. With help from LibertyFi, we were able to slash the time needed to process our quarterly bills by 50 percent."

"Because their areas of expertise include serving clients, creating plans, and managing portfolios, advisors often lack the time or experience to make the most of technology," said **LibertyFi COO Alli Jordan**. "Selecting the best partner to manage the technology can help determine a firm's growth trajectory. With the right expertise, a tech partner can provide the middle office support that enables advisors to focus on clients, while helping to streamline operations."

LibertyFi is helping 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](http://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 accelerate a client's return on their investment in Envestnet, LibertyFi provides tailored onboarding and platform implementation. The company also delivers ongoing personalized consulting services and support to help clients deliver exceptional customer experiences. To learn more about LibertyFi, please visit: [www.libertyfi.com](http://www.libertyfi.com).

**MEDIA CONTACT:**

Lisa Graham

Graham Media Partners

610-688-2060

[lisa@grahammediapartners.com](mailto:lisa@grahammediapartners.com)