



LibertyFi Won WealthTech America's "Outsourcing/Partnership" Category for 2022

March 21, 2022, Birmingham, AL - LibertyFi, as one of the industry leaders, has been handed the honor of winning the Outsourcing/Partnership award in the US categories at the WealthTech Americas Awards 2022.

Showcasing 'best of breed' in the Americas, the awards have been designed to recognize outstanding organizations grouped by specialism and geography, which the prestigious panel of an independent advisory board deemed to have 'demonstrated innovation and excellence during the last year.'

Each of these categories is highly contested, with a small group of finalists and commended submissions chosen from a large pool of entrants before an ultimate winner is selected by the advisory board. It is this process that makes *WealthBriefing* awards so prized amongst winners, finalists and commended alike.

Winning awards is particularly important in challenging times as it gives clients reassurance in the solidity and sustainability of the winner's business and operating model.

Commenting on the firm's triumph, Alli Jordan, Co-Founder, and COO, LibertyFi, said: "This award is a validation of the hard work, energy, and passion we've invested into serving our clients and growing our business. It's rewarding to our entire team to have this industry recognition, which will further differentiate us in wealth tech space."

ClearView Financial Media's CEO, and Publisher of *WealthBriefing*, Stephen Harris, was first to extend his congratulations to all the winners. He said: "The organizations and individuals who triumphed in these awards are all worthy winners, and I would like to extend my heartiest congratulations to the winners and to those who have put so much work into each winning submission.

"These awards were independently and expertly judged solely on the basis of entrants' submissions and their response to a number of specific questions, which were answered by focusing on the client experience rather than purely quantitative performance metrics. That is a unique, and I believe, compelling feature. These awards recognize the very best operators in Americas' wealth management, with

'independence,' 'integrity' and 'genuine insight' the watchwords of the judging process - such that the awards truly reflect excellence in Americas' wealth management."

About LibertyFi

Based in Birmingham, Alabama, LibertyFi is a financial technology and operations consultant for advisory firms, banks, and trust companies. By utilizing Envestnet's suite of innovative technology solutions, LibertyFi enables advisory firms to implement accessible, functional, and cost-effective solutions utilizing its proprietary process. As a middle-office resource, LibertyFi stands beside advisors to execute efficient technology solutions strategically to reach their business goals and streamline their operations. To learn more about LibertyFi, please visit www.libertyfi.com.

About ClearView Financial Media Ltd ("ClearView")

ClearView Financial Media was founded by Chief Executive Stephen Harris in 2004 to provide high-quality 'need to know' information for the discerning private client community. London-based, but with a truly global focus, ClearView publishes the *WealthBriefing* group of newswires, along with research reports and newsletters, while also running a pan-global thought-leadership events and awards program.