

# Losing Schwab Institutional Intelligent Portfolios? We can help.

If you're affected by the closure of Schwab's Institutional Intelligent Portfolios (Schwab IIP) in 2025, we can help you meet your advising and billing needs with our streamlined, compatible system.

## Full-service outsourced middle office, technology, and investment management support

Working as an extension of your team, LibertyFi streamlines technology and middle office operations for RIAs so you can focus on what matters most — serving your clients and scaling your practice. We handle approximately \$15.7 billion in AUA for 30 independent firms, covering 160 advisors held in 41,000 accounts. In partnership with Aptus Capital Advisors, we also offer outsourced asset management, including OCIO solutions, investment management consulting, managed portfolios, and active ETFs.

## Our Customized Asset Management Platform

	LibertyFi + Aptus Capital Advisors	Schwab IIP
Portfolio creation	✓	✓
Automated rebalancing	✓	✓
Tax-loss harvesting	✓	✓
Client onboarding	✓	✓
Client-friendly digital experience	✓	✓
Virtual co-browsing with clients	✓	✓
Dynamic performance reporting	✓	✓
Outsourced middle office	✓	
Personalized consulting	✓	
Technology evaluation and turnkey access	✓	
Technology onboarding and implementation	✓	
Ongoing customized technology support	✓	
Outsourced asset management	✓	
OCIO	✓	
Investment management consulting	✓	
Managed portfolios	✓	
Active ETFs	✓	



We'd love to have a conversation about how our team can support your RIA in transitioning your Schwab IIP account to our customized platform.

## Contact Us for Help

With our deep expertise working with growth-oriented RIAs, we can help you drive revenue and scale your firm with the Envestnet unified advice platform of integrated solutions.

Learn more at [libertyfi.com](https://libertyfi.com) and [aptuscapitaladvisors.com](https://aptuscapitaladvisors.com).