

Your Relationship Management Team

✓ Investnet Training

✓ Investnet Issues

✓ Billing

✓ Performance

✓ Trade Questions

✓ Enhancements



Your Relationship Management team is your day-to-day home office contact for all platform issues and questions. The team will work with you on the platform navigation, enhancements and efficiency.

ADVISOR SUPPORT/ PLATFORM SUPPORT:

AdvisorSupport@libertyfi.com
(205) 582-3400

Andy Wharton
awharton@libertyfi.com

Davis Priestler
dpriester@libertyfi.com

John Brooks
jbrooks@libertyfi.com

BILLING CONTACT:

billing@libertyfi.com

Thomas Reid
treid@libertyfi.com
(205) 582-3405

PAPERWORK:

Paperwork@libertyfi.com
(205) 582-3400

Adair Winkler
awinkler@libertyfi.com

Caroline Corso
ccorso@libertyfi.com

MANAGEMENT TEAM AND ESCALATION CONTACTS:

Alli Jordan, President & COO
amjordan@libertyfi.com
(205) 582-3408