

# Finding success in an unlikely city

How Alli Jordan of LibertyFi found success in an unlikely city and empowers advisors across the U.S. with the help of the Envestnet platform



## Building a team in Birmingham

Birmingham, Alabama is a growing regional financial hub, currently ranked the 12th largest banking center in the nation.<sup>1</sup> And Alli Jordan, CEO and Co-Founder of LibertyFi, has found success, community, and growth here. LibertyFi, in partnership with Aptus Capital Advisors, provides a comprehensive solution for growth-oriented advisors, allowing advisors to fully outsource tech, investment management, and operations. The combined firm services over \$20 billion in client assets, as of May 2024.

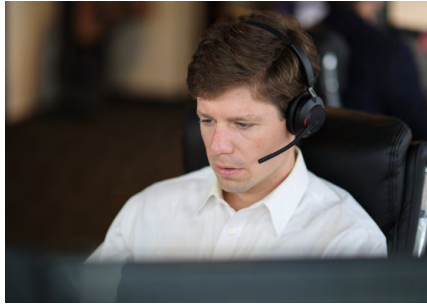
“Birmingham is often overlooked as a financial hub,” Alli explained. It didn’t stop her from sitting down at her kitchen table in 2017 to write up the plans to start her own business. By the end of the year, LibertyFi had three new clients, and the momentum was moving in their favor.

Alli chalks up the success to their team. “It’s more than just what we do on a day-to-day basis. We call it the LibertyFi family. Our client-focused, service-forward approach comes through in the way that we present ourselves, the way that our clients think about us, and it’s the thing I am most proud of,” she says.

Caroline Corso, a LibertyFi Consultant, says the culture of working as a team is what drew her to LibertyFi and keeps her there. “We enjoy helping the advisors. And we also really love doing it together,” Caroline says. “There’s a lot of collaboration, a lot of talking, a lot of teamwork. It’s really unique.”

“I had great mentors... I think that it is so powerful to be at a table with people that are industry vets and knowledgeable. My number one piece of advice is to put yourself in positions that you don’t necessarily think you’re ready for.

**Alli Jordan**  
CEO and Co-Founder of LibertyFi



## A unique opportunity to serve advisors

With a great team behind her, Alli knew she could execute her vision to help advisors grow faster and more effectively. Advisors who work with LibertyFi to outsource their middle office and leverage technology can focus on expanding their services, increasing their enterprise value, and scaling their businesses.

Part of that vision was building trust with their clients. “Think about how important an advisor is to the end clients that they serve. Those clients trust them with their retirement, goals, with really hard situations that come up in their lives. At the end of the day, we’re trying to make it easier on the advisor to better serve that client,” Alli explained.


## Making the tech simple

A major founding principle was making sure they were advising clients on choosing the right technology to help manage and grow their businesses. And sometimes, all those options can be distracting. As Alli puts it, “There are a lot of shiny objects being dangled in advisors’ faces on a daily basis.” LibertyFi knew they needed to find the right platform to guide advisors toward so they could have “an integrated operating system” to run their core business. And that platform was Envestnet.

John Brooks, a Senior Consultant with LibertyFi, explains how the Envestnet platform can help advisors streamline tedious tasks, allowing them to work on more relationship building. “The tools that Envestnet provides allow advisors to stay out of the weeds so they can spend time prospecting and growing their practices. At the end of the day, that’s what they’re good at: prospecting and bringing in assets.”

“Together as a team and with our spouses and our kids. We have a work hard, play hard mentality,

**Caroline Corso**  
LibertyFi Consultant



Beyond advisor productivity, the platform allows advisors to get everything done in one system. “We’ve partnered with Envestnet to run our core businesses because it is an integrated operating system. All of your cash movement, your billing, your trading, the reconciliation, the client experience—everything is in one place,” Alli explained. “And that’s what advisors are yearning for. They want to come to their desk, pull up their computer, and have one place to see everything for their clients.”

In today’s complicated technology landscape, the importance of integrations for any firm’s wealth management tech stack cannot be understated. LibertyFi understands the importance of open architecture when it comes to a firm’s need for flexibility. As Alli explains it: “If you think about the industry and what Envestnet can do, it’s huge. All of the big players are building out their own infrastructure, and being able to plug in where necessary is the future for this technology. Envestnet has done a great job, and advisors can plug into the different components that fit their business needs.”

Caroline works with clients daily and recognizes that recent updates to the Envestnet platform have been popular with their users. “A lot of the updates that Envestnet has done over the last year, including the new interface and the new proposal tool, are intuitive and very easy to navigate.”

## Growth and the future

The partnership between LibertyFi and Aptus Capital Advisors positions the combined firm well for the future. Alli was careful to choose a partner who aligned on two key principles: culture and client service. “We’re really excited about the potential for us as a firm and for our clients, as we’re able to serve more and do more for them. But the big thing that was really important to us was the culture—being aligned in our principles and how we serve advisors.”

What would Alli say to anyone new to the industry? “I had great mentors...I think that it is so powerful to be at a table with people that are industry vets and knowledgeable. My number one piece of advice is to put yourself in positions that you don’t necessarily think you’re ready for.”

In July 2024, LibertyFi will celebrate its seventh anniversary. Even after a global pandemic and major shifts in the industry, they have been able to thrive. With a hungry mindset and great connections, LibertyFi is sure to go even further. As for how they like to celebrate their success? “Together as a team and with our spouses and our kids. We have a *work hard, play hard* mentality,” Caroline said with a wink.

“The tools that Envestnet provides allow advisors to stay out of the weeds so they can spend time prospecting and growing their practices. At the end of the day, that’s what they’re good at: prospecting and bringing in assets.”

**John Brooks, a Senior**  
LibertyFi Consultant



[Learn more on investnet.com.](https://www.envestnet.com)

<sup>1</sup> <https://www.birminghamal.gov/about/>

The information, analysis, and opinions expressed herein are for general information only. Nothing contained in this video is intended to constitute legal, tax, securities, or investment advice, nor an opinion regarding the appropriateness of any investment, nor a solicitation of any type.

LibertyFi and Envestnet are separate and unaffiliated firms. This material should not be construed as a recommendation or endorsement of any particular product, service, individual or firm. Envestnet did not directly compensate LibertyFi for their testimonial, however, Envestnet paid for filming and production costs. The resulting content may be repurposed by LibertyFi for their own advertising purposes, at their discretion and cost.

© 2024 Envestnet, Inc. All rights reserved.