

LibertyFi Grows to \$10B AUA in Less Than Four Years

Fintech and operations consultant drives sustained, rapid growth

Birmingham, AL – April 28, 2021 – [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 22 clients and has \$10 billion in assets under administration (AUA) on Envestnet's enterprise platform. Since 2018, the company has increased AUA by \$6.5 billion, casting a spotlight on advisor demand for expertise in managing and configuring technology to streamline key business operations.

By enabling advisors to focus on serving clients, LibertyFi helps growth-oriented RIAs drive revenue and scale their practices. 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.

"Our expertise is based on years of experience, seeing what works, and learning from what doesn't," said **Trey Ruch, CEO at LibertyFi**. "Every day, we apply that experience to accelerate clients along the learning curve to get things done and done well. By acquiring just a few basic skills, advisors can deliver the kinds of digital experiences that today's clients expect."

LibertyFi has helped independent, employee-owned and -operated investment management firms like Carnegie Wealth Management use the Envestnet platform to offer clients a highly personalized experience.

"LibertyFi helped us create incredibly efficient and organized workflows," said **Scott Sheffer, CEO at Carnegie Wealth**. "I can almost run this entire business myself. Because of LibertyFi, our model has tremendous scalability."

"RIAs can accelerate growth, increase efficiency, and drive productivity by selecting an experienced partner to manage and configure their wealth technology—without having to increase headcount," said **Alli Jordan, COO at LibertyFi**. "With streamlined and automated workflows, advisors can focus on serving clients."

LibertyFi helps 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.

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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 learn more about LibertyFi, please visit: www.libertyfi.com.

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