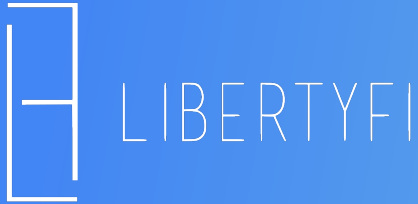


Consulting Case Study: Distribution Support



LibertyFi needed help creating the new company from the ground up, including raising capital and negotiating consulting contracts. Once LibertyFi was established, they need ongoing consulting and distribution support.



Issues



- Needed to identify team of knowledgeable operations personnel that could deliver services to RIA community
- Entity would require short-term funding to launch operations and attract staff
- Needed a license agreement with Envestnet to deliver services profitably to RIAs
- Needed help with day-to-day operations of new entity and sales support to drive growth

Results



- Identified team at Sterne Agee to staff new company
- Negotiated consulting contract with Envestnet that provided short-term operating capital
- Attained license agreement to deliver Envestnet's enterprise solution to RIA market
- **Created new company from the ground up** – formed LLC, created operating agreement, raised capital, etc.
- In 5 years, LibertyFi works with **24+ firms and has \$12B+ AUA**