

A FLYOVER
THE WEALTH ENGINEERING
EXPERT SOURCING CONSORTIUM PROGRAM

An elastic infrastructure of carefully selected outsourced firms fused into the dense fabric of the WE Universe of TopTier Wealth Advisory Firms



Powered By
THE
WEALTHENGINEERING™
FAMILY OF COMPANIES



"It Takes A Village"

Our exclusive team of independent expert sourcing firms assist in dealing with the ever-changing ecosystems of Managers of Wealth and their Clients.



▪ **High-Touch Wealth Advisory Fused With High-Touch Wealth Tech** ▪

Wealth Engineering – A Seismic Shift in Wealth Management

Fusing advanced knowledge, experience, services, technology and products with sound engineering principles to create a synchronized hub for family and business total wealth building.

The WE consulting model transforms firms from “AUM/Product Providers” to “Holistic Fee-Based/AUM Solutions Providers,” while streamlining technology and bridging “HNW Client Offering Gaps”.



Our Wealth Engineering Community

Multi-Family Offices • RIA Firms • Insurance & Investment Organizations • Retirement Planners
B/Ds • Wealth Management Firms • Legal & CPA Firms • Financial & Estate Planners • Custodians



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The Wealth Ecosystem Dashboard

High-Touch Wealth Advisory Harmonized With
High-Touch Wealth Tech



Neutralize Competitors • Expand Client Offerings • Harvest More Clients • Future-Proof Success



The WE FusionPowered Sandbox
Engineered over the past 44+ years
RIA/MFO/CPA/BD Firm Clientele Analysis
 As of 12/31/2025

Approximate Amounts

Total RIA/MFO/CPA/BD Firms	2,138
Number of MFOs	32
- Serving # of Family Offices	1,752
Number of B/D Firms	22
Total AUM	\$480 Billion
Total Client Net Worth	\$9.5 Trillion
Number of "Wealth Advisors"	13,700
Monthly Fee Range/Firm	\$300 - \$12,500
Monthly Fee - Average/Firm	\$678
Total Annual Fees	\$14,477,000

RIA Firm Groupings by AUM Size – Total -1,992

AUM Range	Firm#	Total AUM
\$5B - \$17B	6	\$ 58 Billion
\$1B - \$ 5B	62	\$ 36 Billion
\$500M - \$1B	314	\$ 54 Billion
\$250M - \$500M	1168	\$ 303 Billion
\$ 75M - \$250M	442	\$ 29 Billion

Confidentiality-Non-Compete Agreements include licensing of "selected" WE portfolio of customized proprietary materials; coordinated with coaching, training, marketing and case design consulting services.



Wealth Engineering

Our Fee-Based Wealth Engineering "Mall of Capabilities"

A dynamic portfolio of white label, modular solutions comprised of advanced strategy marketing brochures booklets and presentations.

• Supported by coaching training, marketing and case design

Future-Proofing Wealth Advisory Practices in the New Age - Modernizing wealth advisory platforms thru digital transformation



Wealth Engineering

An elastic consulting infrastructure - Fused together for TopTier Wealth Advisors

Monthly Advisory Retainer Fees Range From \$300 to \$12,500

Contingent upon services selected, firm size, etc.

Embrace The Digital Revolution - Bridge Your Blind-Spots = Cut away the bad plumbing of detached digital and manual processes



The 365/24/7 Expert Sourcing Consortium Showcasing Summary

2,170+ RIAs with \$480 Billion+ in AUM & 13,700+ Advisors ▪ 22 B/Ds with 2,300+RRs ▪ Insurance Pros ▪ CPA Firms ▪ MFOs

A Bundled Showcasing Portfolio: Continuous “Wave Marketing” coupled with Two Annual Conferences

Exclusive Endorsement By Advisory/Technology Category

Annual Conferences

Present (40 Minutes) and Exhibit at Winter and Summer Wealth Advisory Conferences

- Limited to 150 Execs of RIA, CPA, B/D Firms and Top-Tier Wealth Advisors ▪
- Deep cross-pollination ▪ No breakout sessions ▪ Presentations recorded ▪ Interview sessions ▪

weconferences.com



- Initial Press Release issued introducing each new Expert Sourcing Partner Firm.
- Regularly Scheduled Podcasts - Two “Showcase Topic Podcasts/Webinars” annually.
- Two WE staff members connect Wealth Advisors with Expert Sourcing Firms
- Embedded within the Wealth Engineering Family of Companies Showcasing Infrastructures.
- Access to Members of WE MasterMind Groups located in selected cities across the country.
- ES Partner Firm Conference Virtual Meetings scheduled on a quarterly basis.
- Clickable logo placement on WE Family of Company websites:
MyWEhub.com ▪ MyWealth-Hub.com
- Clickable logo placement on “side bar” of WE Family of Company publications:
 - Monthly Newsletters • Announcements • Press Releases
 - Bi-Monthly Teleconference Invitations • Summer and Fall Conference Invitations
- ES Partners provide Knowledge Center content and participate in the following:
 - Podcasts • Monthly Newsletters • Webinars • Whitepapers • Videos & Presentations





Our OpenOption Practice Engineering Ecosystem

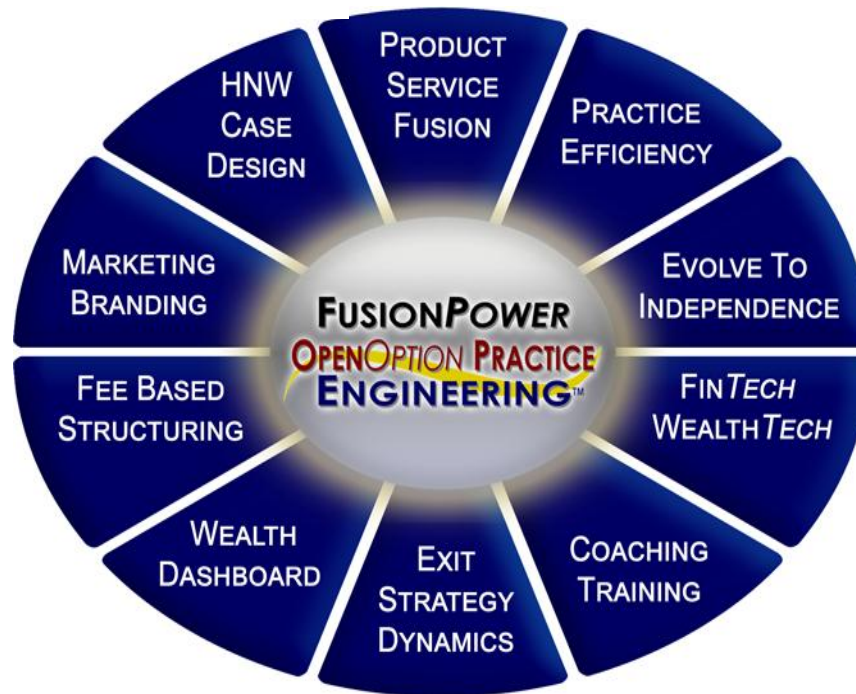
"Recalibrating advisory practice ecosystems to enhance success"

Helping Firms Install Strategies

Syncing their "practice ecosystems" with the "wealth ecosystems" of their HNW families and businesses.

Helping Advisors Deploy Tactics

Evolving their "Centers of Gravity" from "AUM/Product Provider" to "Holistic Fee-Based Solutions Provider".



The Wealth Engineering Institute

Governing Body and Grantor of the following Professional Designations

CHARTERED FAMILY OFFICE ADVISOR – ChFOA ▪ **CHARTERED WEALTH ADVISOR - ChWE**

MyWEhub.com



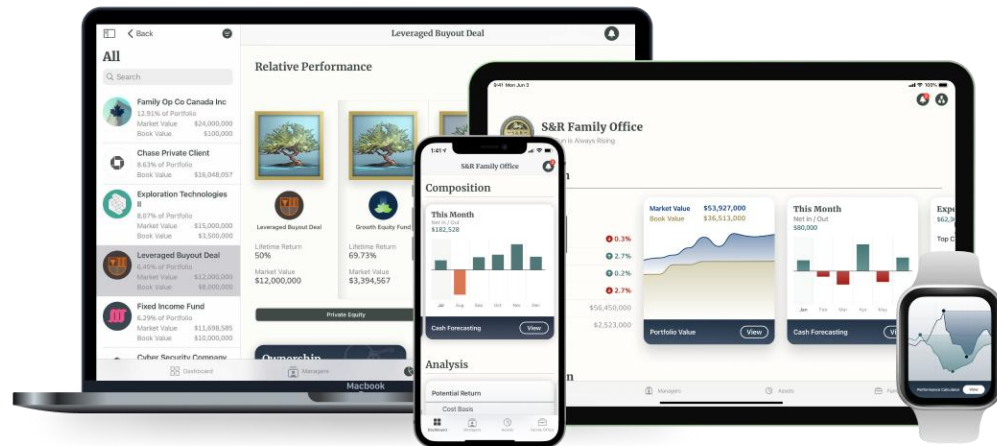
WE Mastermind Groups Within Each Region



Raise Your Game To Align With
Businesses • Business Associations ▪ Franchises • Family Enterprise Centers



Expert Sourcing Consortium Showcasing Portfolio ▪ 365/24/7 ▪



Helping Firms Transform Into A New Wealth Management Dimension To Magnify Success
Helping Rejuvenate The Contours Of Advisory Practices To Become More Agile



The WE Expert Sourcing Consortium



In a Sea of Sameness - Brand • Position • Differentiate - Create An Unfair Advantage
"add new ingredients to your mixing-bowl"



The Wealth Advisory Hub Knowledge Center

A Vast Digital Library For TopTier Wealth Advisors

Podcasts • Newsletters • Webinars • Videos • Whitepapers • Teleconferences
National and Regional Conferences • Peer-to-Peer Forums

Advisors can select from the categories below to learn and grow



"Future-Proofing Wealth Advisory Practices in the New Age"
Modernizing wealth advisory platforms thru digital transformation

<https://thefei.com/knowledge-center/>



Home Page of Fall 2025 Conference Website - <https://mywehub.com/conference/>

PRESENTED BY
 **THE WEALTH ENGINEERING INSTITUTE™**

[Summary](#) [Agenda](#) [Presenters](#) [Partners](#) [Venue](#) [Registration](#)

LIVE IN ORLANDO - OCTOBER 22ND - 24TH
The FusionPower Wealth Advisor Conference
Bridge the Offering GAPS Demanded by HNW Clients to Magnify Success
Fuse New-Age Advice, Products and Services with Digital Transformation



MASTER THE MAZE
Raise Your Game - Convert From Checkers To Chess
Get Your Backstage Pass To Holistic Learning



Kicking-Off the Winter 2025 FusionPower Conference

Nick Gregory, ChWE - CEO & Founder of The Wealth Engineering Family of Companies

The slide content is as follows:

WEALTHENGINEERING™

The Why - *engineering dreams into life*

- Filming - Editing
- Agenda - BIOs - Readers Digest Version
- Wealth of Knowledge In this Room
- Two Warehouses – Products/Concepts
- Elastic Infrastructure - The Blindspots
- Centers of Gravity - Chess vs Checkers
- Half-Time Show – Blocking & Tackling Daily
- Designations – ChWE, ChCCA
- Technically Intensive – Client Centric
- Knowledge Is Power - Sequential Marketing
- The Evolution of Wealth Eng – Back in NE Ohio

The FUSION POWERED Advisor

*“One Rose” vs “The Rose Garden”
Master the HNW Wealth Advisory Maze at Scale*

Winter 2025 WE FusionPower Conference – Selected Presenters





WE Fall of 2025 National Conference LinkedIn Post Invitations

Sample LinkedIn Post Format

Orlando
October
22nd - 24th

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**The Fall
FusionPower
Conference**

Become A FusionPowered Advisor
High-Touch Wealth Advisory Harmonized
with High-Touch Wealth Tech.


Selected Presenter
Mark Gilbert
CEO
Zocks

Orlando
October
22nd - 24th

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Selected Presenter
Evgeniy Yashin
CEO and Co-Founder
Holistico



The WE FusionPower Podcast Series – Podcasts Exclusive to Expert Sourcing Firms

Sample LinkedIn Post Formats – Podcasts - Interviews

THE FUSIONPOWER PODCAST SERIES

HOST
Nick Gregory
CEO
The Wealth Engineering Hub

WEALTHENGINEERING™

Special Guest
Andrew Nikolai, CFA
Managing Director
CSG Partners

Fusing ESOP Design into M&A Transactions

Special Guest
Andrew Nikolai, CFA - Managing Director of CSG Partners

CSG PARTNERS

Industry leaders fusing advanced knowledge, services, concepts, products and practice management tooling with sound engineering principles.

THE FUSIONPOWER PODCAST SERIES

HOST
Nick Gregory
CEO
The Wealth Engineering Hub

WEALTHENGINEERING™

Special Guest
Mark Gilbert
CEO & Co-Founder
Zocks

Embedding Your AI Central Communication Hub Into Your Wealth Advisory Practice

Special Guest
Mark Gilbert - CEO and Co-Founder of Zocks

zocks

Industry leaders fusing advanced knowledge, services, concepts, products and practice management tooling with sound engineering principles.

WEALTHENGINEERING™
Press Release LinkedIn Posts

For Immediate Release


WEALTHENGINEERING
HOLISTICO
Wealth Builder

Holistico Joins Our Expert Sourcing Consortium

It Takes A Village

This arsenal of best-of-breed Expert Sourcing Firms is highly experienced and multi-disciplined; equipped to amplify the perpetual value and success of 2,150+ wealth management firms across the country.

WEALTHENGINEERING
An Elastic Infrastructure For Managing Total Wealth
Bridging the "Client Offering GAPS" demanded by HNW Families and Businesses

For Immediate Release


WEALTHENGINEERING
 **CSG PARTNERS**

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MASTER THE MAZE
Raise Your Game - Convert From Checkers To Chess
Get Your Backstage Pass To Holistic Learning



WEALTHENGINEERING™
FUSIONPOWER
Diversify into a true
Wealth Management Dimension



 **THE CHARITABLE CAPITAL™**
DESIGN CENTER

CHARITABLE CAPITAL PLANNING
Planned Giving Redefined
Converting Taxable Capital into Charitable Capital



MyWealthHub

The Wealth Engineering Family of Companies

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MyWEHub.com ♦ MyCharitableCapital.com ♦ MyWealth-Hub.com ♦ MyFamilyBusinessHub.com