

A FLYOVER

The Wealth Engineering Expert Sourcing Consortium

An elastic infrastructure of carefully selected outsourced firms *FUSED* into the dense fabric of The WE Universe of TopTier Wealth Advisory Firms.

It Takes A Village

Powered By The WE Family of Companies

The Wealth Engineering Dashboard



The Wealth Engineering Sandbox - A Snapshot

As of 12/31/2025

2,138

Total RIA Firms

\$480B+

Total AUM

\$11.5T

Total Client Net Worth

13,400+

Wealth Advisors

RIA Firm Groupings by AUM Size

AUM Range	Number of Firms	Total AUM
\$5B – \$22B	6	\$58 Billion
\$1B – \$5B	62	\$36 Billion
\$500M – \$1B	314	\$54 Billion
\$250M – \$500M	1,168	\$303 Billion
\$75M – \$250M	442	\$29 Billion

Monthly Consulting Retainer Fees Range From \$300 to \$12,500 • Contingent upon services selected, firm size, etc.

The Expert Sourcing Consortium

SHOWCASING SUMMARY

Continuous 365/24/7 Exposure

▶ **Exclusive Endorsement By Advisory or Technology Category**

▶ **Two WE staff members connect Wealth Advisors with Expert Sourcing Firms**

▶ **Spring and Fall Conferences: Present (40 min) and Exhibit – Limited to 150 C-Suite Execs of RIA, CPA and B/D Firms and Top-Tier Advisors**

▶ **Embedded within WE Family of Companies Showcasing Infrastructures**

▶ **Initial Press Release introducing each new Expert Sourcing Partner Firm**

▶ **Clickable logo on MyWEhub.com and MyWealth-Hub.com + Newsletters, Announcements, Press Releases**

▶ **Regularly Scheduled Podcasts – Two "Showcase Topic Podcasts/Webinars" annually**

▶ **Quarterly Expert Sourcing Partner Firm Virtual Meetings**

WE FusionPower Conferences

Two Annually – Spring and Fall

Upcoming Fall 2026 – Sept. 23-25 - Orlando

weconferences.com

Key Conference Features

- Forty Minute Presentations recorded
- Deep cross-pollination sessions
- No breakout sessions — high focus
- Presenter interview sessions
- Limited to 150 Execs of RIA, CPA, B/D Firms and TopTier Advisors
- Exhibit area located inside the meeting room

Recalibrating advisory practice ecosystems to enhance success

Future-Proofing Wealth Advisory Practices in the New Age"



The Wealth Engineering Community

"Future-Proofing Wealth Advisory Practices in the New Age"

Multi-Family and Single Family Offices

Registered Investment Advisory Firms

Insurance and Investment Organizations

Retirement and Insurance Planners

Broker/Dealers, OSJs and RRs

Wealth Management Firms

Legal and CPA Firms

Financial and Estate Planners

Custodial and Clearing Firms

TAMPS

Wealth Engineering – A Seismic Shift

High-Touch Wealth Advisory *FUSED* WITH High-Touch Wealth Tech

Our Mission

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

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

Expert Sourcing Firms help Advisors add new “ingredients” to their “practice mixing-bowls”

The Consulting Model

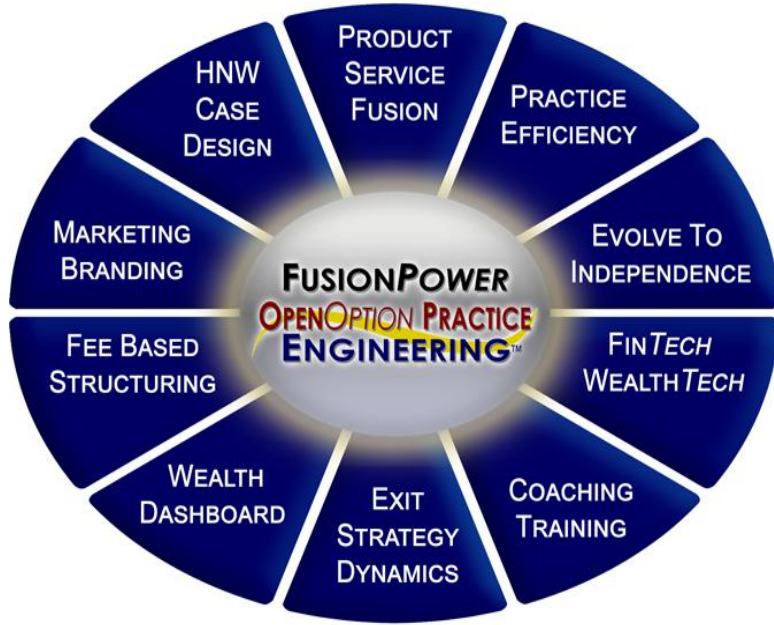
Transform firms from *"AUM/Product Providers"* into *"Holistic Fee-Based/AUM Solutions Providers"*

Streamlining technology while bridging HNW Client Offering Gaps.



The OpenOption Practice Engineering Platform

The Wealth Advisory Knowledge Center



Knowledge Center - A Vast Digital Library

Podcasts • Newsletters • Webinars

Videos • Whitepapers • Teleconferences

National and Regional Conferences

Peer-to-Peer Forums

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".

Fall 2025 WE FusionPower Conference

weconferences.com

WEALTH ENGINEERING™

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*

Fall 2025 WE FusionPower Conference – Selected Presenters



Selected Powercast Graphics

mywehub.com/podcasts

THE FUSIONPOWER PODCAST SERIES

HOST
Nick Gregory
CEO
The Wealth Engineering Hub

WEALTHENGINEERING

Special Guest
Michael Liberman
CEO & Co-Founder
Allposit

*Fusing A Digital Infrastructure Into High Net Worth Focused RIA's
As Well As MFO Firms And Single Family Offices*

Special Guest
Michael Liberman - CEO & Co-Founder of Allposit

Allposit

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
Joe Morin
CEO & Co-Founder
CyFlare

*Embedding A 360 Degree Cyber Security Platform Into Wealth Advisory Practices
As Well As Individual Wealth Advisory Clients*

Special Guest
Joe Morin - CEO & Co-Founder of CyFlare

CYFLARE
The threat stops here.

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
Peter Russo
Founding Member
FamVault

*A Command Center Infrastructure For All Of Your Clients Important Documents
Organized And Managed Within A Secure Vault*

Special Guest
Peter Russo - Founding Member of FamVault

FamVault
PROTECT YOUR FAMILY

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
David Sawyer
CEO & Founder
Unlimited.AI

*Utilizing An AI Native Command Center Infrastructure For High Net Worth
Focused RIAs As Well As Multi Family Offices And Single Family Offices*

Special Guest
David Sawyer - CEO & Founder of Unlimited.AI

unlimited.ai

Industry leaders fusing advanced knowledge, services, concepts, products
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Selected Press Release Graphics

mywehub.com/press-releases

For Immediate Release



WEALTHENGINEERING
Vanilla

Vanilla Joins Our Expert Sourcing Consortium

If 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
FamVault
PROTECT YOUR FAMILTY

FamVault Joins Our Expert Sourcing Consortium

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WEALTHENGINEERING
TAMARIX

Tamarix Joins Our Expert Sourcing Consortium

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Allposit

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The Expert Sourcing Consortium



Neutralize
Competitors

Expand Client
Offerings

Harvest More
Clients

Future-Proof
Success

The Wealth Engineering Family of Companies

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