HOME OF FUSION*POWERED* WEALTH ADVISORY

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

The Wealth Engineering Sandbox – *Evolved over the past 44+ years*

Encompassing 2,170+ RIAs with 11,400+ Advisors and AUM of $420+ Billion

$9.5+ Trillion of Client Net Worth ▪ 22 B/Ds ▪ CPA Firms ▪ MFOs

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

Embrace The Digital Revolution - *Bridge Your Blind Spots*

"Cut away the bad plumbing of detached digital and manual processes."

Master The HNW Advisory Maze At Scale

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.

A wealth advisory ecosystem synchronized with turnkey modular solutions
Bringing families, their businesses, their advisors and all of their wealth together

THE FUSION*POWERED* ADVISOR
An unfair advantage

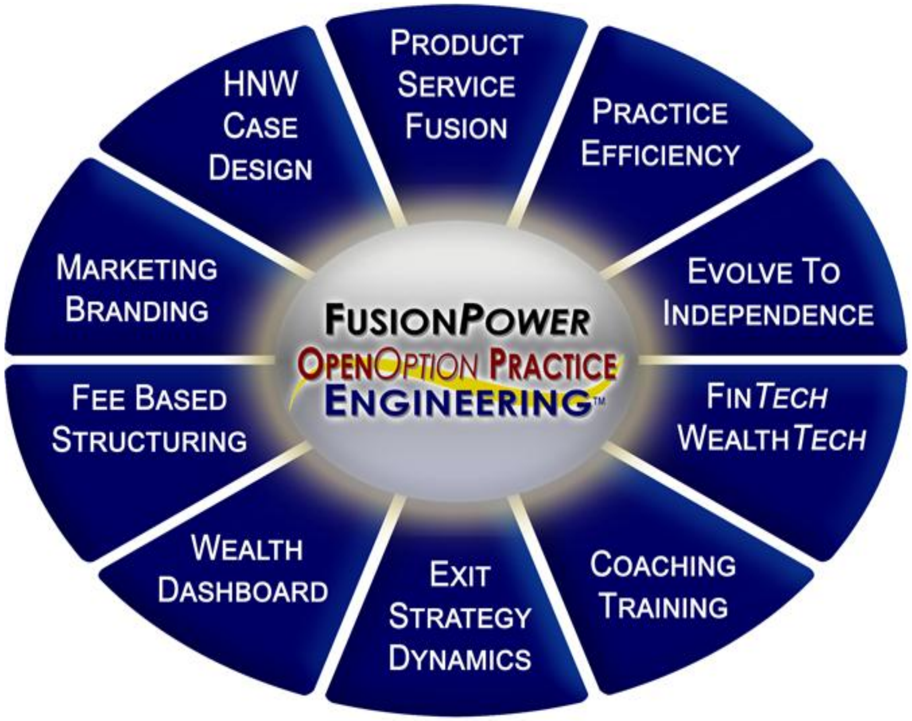
Fortify your client value proposition by fusing new services, products and technology into your offering; creating fresh revenue and profit silos while enhancing client acquisition and retention, along with leveraging against future uncontrollable, catastrophic events.

MyWEhub.com

Our Open*Option* Practice Engineering Sandbox
"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".



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

MyWEhub.com

WEALTHENGINEERING™

An Elastic Infrastructure - *Fused together for TopTier Wealth Advisors*

HIGH TOUCH WEALTH ADVISORY

Digitally Synchronized ▪ Harmonized Interaction

Advisors separate from the "AUM Herd"; becoming true "wealth solutions providers"

"adding new ingredients to their products and services mixing-bowl"

▪ Growing Organically thru "NON-AUM" Fee Structures ▪

Our Fee-Based Wealth Engineering Mall of Capabilities

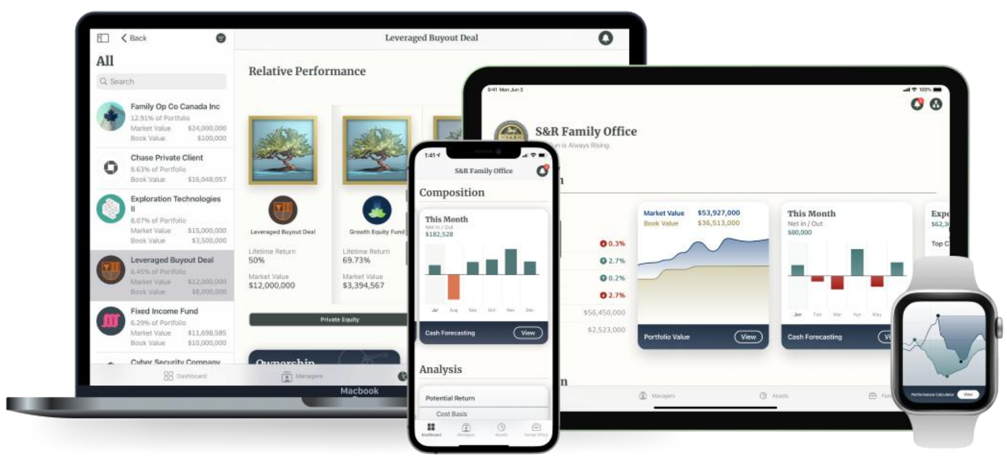
A dynamic portfolio of white label, modular solutions comprised of

Advanced strategy and marketing brochures, booklets, presentations, etc.

▪ Supported by high touch coaching, training, marketing and case design ▪

Monthly Consulting Retainer Fees Range From $300 to $12,500

Contingent upon services selected, firm size, etc.



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".

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

The Why – Create *A Seismic Shift in True Wealth Management*

Helping Wealth Managers Bridge Their "HNW Client Offering Blind Spots"

Bridging the Blind Spot GAPs between what Clients Receive and what they Desire from Wealth Managers

As illustrated By The Spectrem Group Research Chart Below

The Solution — The Fusion*Powered Wealth* Advisor

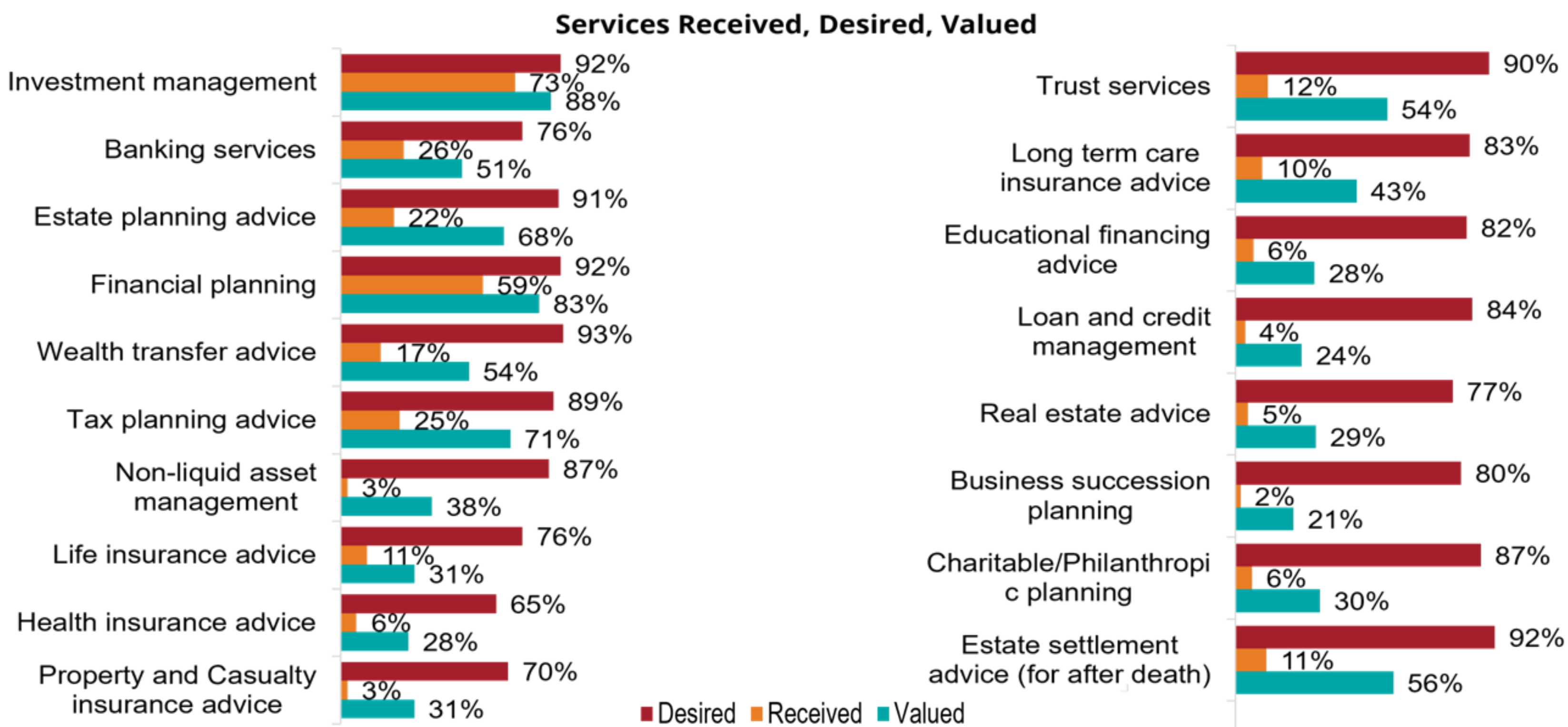
Fusing sound engineering principles with multi-dimensional advice, services, tech and products.

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

Coupled with Coaching ▪ Training ▪ Marketing ▪ Case Design ▪ HNW Strategies/Tactics

"Shore-up Wealth Advisory Weak Points"

THE SPECTREM GROUP – WEALTH MANAGEMENT SERVICES "GAPS CHART"*



*Exerpt from the 11/1/21 Spectrem Group Research Article: Focus On What Investors Want

The Wealth Engineering™ Family Of Companies

Wealth Engineering Brands

WealthAdvisorsHub™

EBenefitsHub

MyWealthHub

FamilyBusinessHub

The CharitableCapital™ Design Center

Give Back Nation
Your Giving & Fundraising Hub

The WealthEngineering™ Institute Engineering dreams into life™

DIVISIONS

The EBenefitsPEP

My Insurance Hub

Give@Work

Boomer Lifestage Coaching

CyberPrivacyHub

FinancialEngineering for Pro Athletes
Engineering Dreams Into Life

The Wealth Engineering Institute
Governing Body and Grantor of the following Professional Designations
CHARTERED FAMILY OFFICE ADVISOR – ChFOA ▪ CHARTERED WEALTH ENGINEER - ChWE
CHARTERED CHARITABLE CAPITAL ADVISOR - ChCCA

MyWEhub.com ♦ MyCharitableCapital.com ▪ MyWealth-Hub.com ♦ MyFamilyBusinessHub.com

Providing "Flex and Balance" – Maintaining "Choices of Options"

Modular Programs selected from the "Mall of Wealth Engineering"

A Concierge Approach – Manuals ▪ Brochures ▪ Booklets ▪ Presentations ▪ Much More

Private Label Solutions — Branded marketing materials supported by coaching, case design and training

- **The Family Wealth Hub Dashboard**
  The Ultimate Family and Business Ecosystem Infrastructure
- **Family Business***Engineering*360
  Dealing effectively with their *financial life support systems*
- *E***Benefits***Engineering* **for Businesses**
  Coordinate employee benefit strategies and tactics effectively
- **Business Transition***Engineering*
  Transitioning business ownership effectively and efficiently
- **Boomer Life*****Stage*** **Wealth Coaching**TM
  Capture Top*Tier* BoomersTM - The Top 9%, HHI of $150,000+
- **Wealth Engineering for Pro-Athlete and Celebs**
  Dealing effectively with their entire *financial ecosystem*
- **Wealth Engineering for Medical Professionals**
  Dealing effectively with their *financial life support systems*
- **The Give Back Nation Affiliate Program**
  Maximize "community involvement" for Advisors and Clients
- **Charitable**CapitalTM **Planning**
  Planned Giving Redefined - The third form of financial capital
- **Turnkey Private Label Trust Services Program**
  Powered by a unique trust company and powerful state trust law
- **The *Leveraged* Executive*Loan***TM
  A alternative to split dollar/deferred compensation design
- **The Family Business Private Insurance Company**
  Multiple risk, tax and business planning opportunities
- **Shadow**Equity **Incentive Benefits**TM
  Ownership Motivation *without* the Ownership
- **Tax**Engineered **Accredited Investing**TM
  A paradigm shift in investment, tax and risk management
- **The Charitable**CapitalTM **Gift Annuity Program** (CGA)
  A lifetime of receiving through givingTM
- **Leveraged**IRA **Giving**TM
  Converting IRA Assets into CharitableCapitalTM
- **The Family**Generational **Trust Program**TM
  Tax deferred investing within a generational trust
- **The Private**Income **Trust**TM **Program** (PIF)
  Income and tax savings while living - giving at death
- **The Managed**IncomeTM **Trust** (CRT)
  Management of income, investing, taxation and giving
- **The Private**Giving **Fund**TM (DAF)
  A Private Labeled DAF turnkey platform
- **The Managed**Lead **Trust**TM (CLT)
  Management of income, investing, taxation and giving

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

MyWealthHub

The Ultimate Virtual HNW Wealth Advisory Platform

Bridging HNW Client Blind Spots

HOLISTIC WEALTH ADVISORY FIRM CENTRIC TECHNOLOGY

STRUCTURES

RIA - B/D

Accounting Firms

Insurance Agencies

Law Firms

Wealth Advisory Platforms Merged With Family Office Platforms Thru "Wealth Engineering Fusion*Power*"

Holistic Digital Synchronization

▪ Dashboard Sidebars ▪
▪ APPs ▪
▪ Integrations ▪
▪ APIs ▪

Families and their advisors engineer their dashboards; harmonizing financial control, designing investments, maintaining family cohesion and enterprise dynamics.

HOLISTIC FAMILY *AND* ENTERPRISE CENTRIC TECHNOLOGY

STRUCTURES

Private Family Trust Companies

Directed Trusts

Family Limited Partnerships

Other

MyWealth-Hub.com/MyWealthHubVideo4.mp4

MyWealthHub

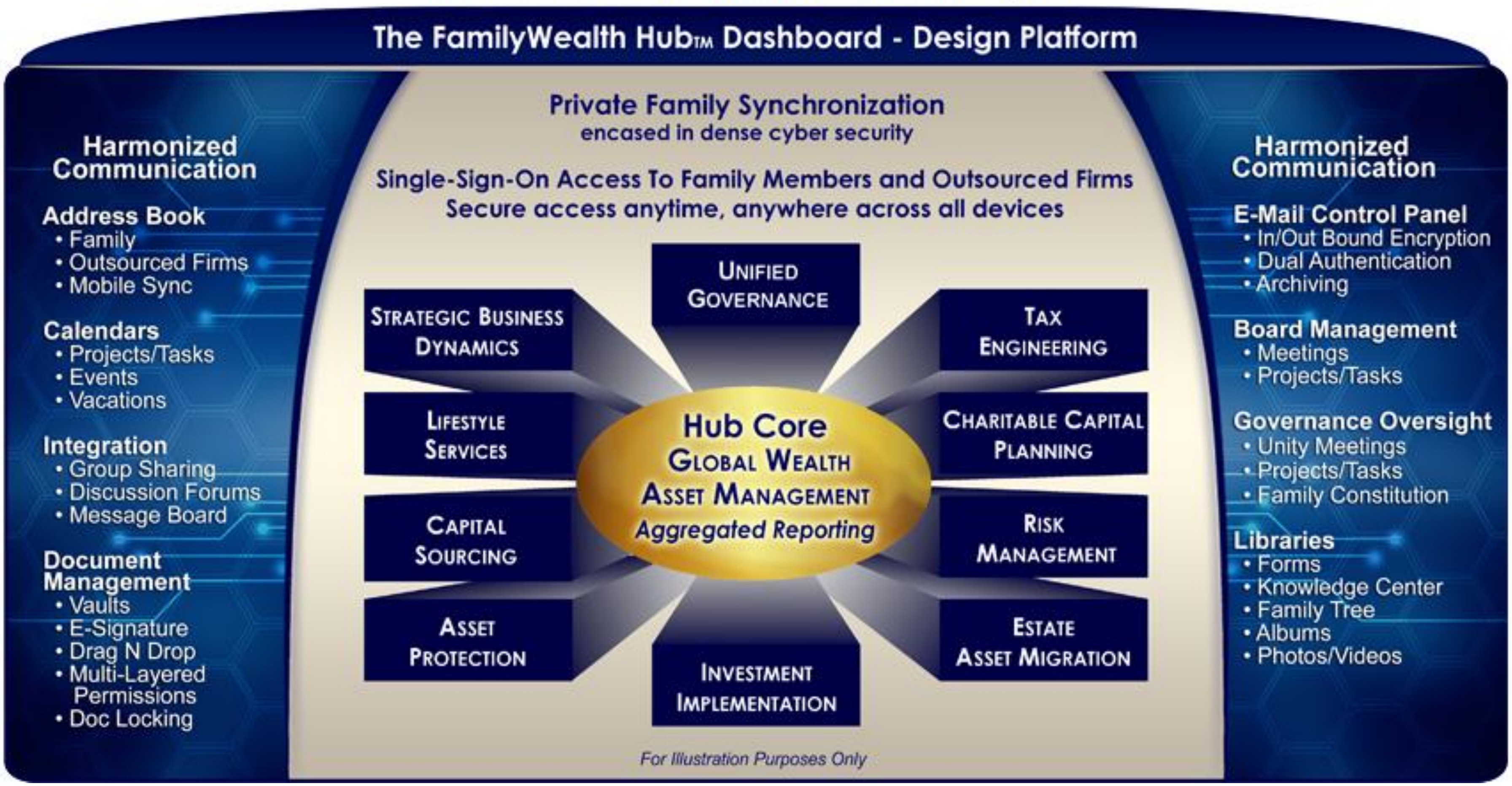
The WE Virtual Multi-Family Office Dashboard

checklists and spreadsheets are gone forever

Organize, Store, Track, Collaborate, Activate, Transmit

Everyone • Everything • Anytime • Anywhere

One *Touch360* ▪ Total Control ▪ Seamless Navigation



Example Only – Not reflective of actual Dashboard

The CharitableCapital™ Design Center

2024 Planned Giving Results

Over $2.3 Billion In Planned Gifts

Key Giving Tools	Ave. Size	Total Contributions
152 Remainder Trusts	$2.3M	$349,600,000
55 Lead Trusts	2.7M	148,500,000
26 Pooled Income Trusts	1.9M	49,400,000
3,611 Insured CGAs	258M	931,638,000
17 Leveraged IRA Giving	3.5M	59,500,000
52 Donor Advised Funds	362M	18,824,000

ChCap.org

The Five Core Forms of Capital

Family Capital

Taxable Capital

No Control — No Ownership — No Use

Income and assets we must give up through taxation

Personal Financial Capital

Ownership — Control — Use

Income and assets we can spend or leave to others

Business Capital

UNIQUE *Ownership — Control — Use*

UNIQUE *income and assets we can spend and leave to others*

Charitable Capital™

More to Control — More to Use

Increases the amounts of income and assets we use and control

FamilyBusinessHub

The Family Business Hub

Business Member Benefits

Exclusive Access to
Business Hub Advisors
and
Expert Sourcing Companies
National — Regional — Local
for
Training ♦ Education ♦ Consulting
Services ♦ Products

Local Chapters

Monthly Meetings and Newsletters
Timely Topic Webinars
Business Support Tools
Coordination with regional
Collegiate Family Enterprise Centers

Results

Businesses Built to PREVAIL

MyFamilyBusinessHub.com

WE Mastermind Groups Within Each Region

Raise Your Game To Align With

Businesses • Business Associations ▪ Franchises • Family Enterprise Centers

WEALTHENGINEERING™

The Wealth Engineering Family of Companies
National Headquarters — Orlando Florida • Nick@MyWEHub.com • 407.878.3520
MyWEhub.com ♦ MyCharitableCapital.com ♦ MyWealth-Hub.com ♦ MyFamilyBusinessHub.com