

The WEALTH ENGINEERING Hub

Home of The “FusionPowered Advisor”
Holistic Fee-Based/AUM Solutions Providers

HIGH TOUCH WEALTH ADVISORY
Digitally Synchronized • Harmonized Interaction

The Wealth Engineering Dashboard



THE FUSIONPOWERED ADVISOR

Creating An Unfair Advantage • In A Sea of Sameness — Brand • Position • Differentiate

Fortify Your Value Proposition

Fuse new services, products and technology into your offering — creating fresh revenue and profit silos while enhancing client acquisition and retention.

Grow Organically

Leverage NON-AUM fee structures to separate from the AUM herd and become a true wealth solutions provider.

Future-Proof Your Practice

Leverage against future uncontrollable catastrophic events by building a synchronized, elastic infrastructure.

OUR COMMUNITY BY THE NUMBERS

2,170+

RIA Advisory Firms

13,400+

Top-Tier Advisors

\$480B+

Assets Under
Management

\$11.5T+

Client Net Worth

22

Broker/Dealers

BORN
44+ Years Ago

WHAT IS WEALTH ENGINEERING?



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

MASTER THE MAZE

Navigate the full complexity of HNW wealth management with a multi-disciplinary approach

BRIDGE BLIND SPOTS

Identify and close the gaps between what HNW clients receive and what they desire

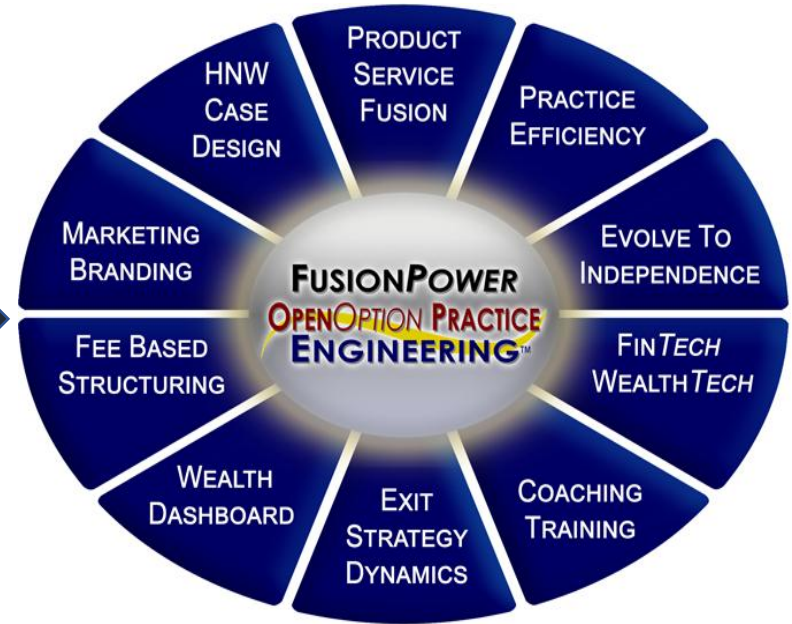
A SEISMIC SHIFT

Transform from AUM/Product Provider to Holistic Fee-Based Solutions Provider

THE OPENOPTION PRACTICE ENGINEERING PLATFORM

OpenOption Practice Engineering Features

- ▶ Recalibrating advisory practice ecosystems
- ▶ Transform into a new wealth management dimension
- ▶ Rejuvenate contours of advisory practices
- ▶ Become more agile and future-proof
- ▶ Sync practice ecosystems with HNW client wealth ecosystems
- ▶ Custom designed success blueprints
- ▶ Dream engineering interfaced with competent advice
- ▶ Monitored and refined as needed



KEY CAPABILITIES and SOLUTIONS

"Shore-up Wealth Advisory Weak Points"

What Clients **RECEIVE**

- ✗ Basic AUM/Product Advice
- ✗ Fragmented Digital Tools
- ✗ Limited HNW Strategies
- ✗ Reactive Planning Only
- ✗ Generic Solutions

THE GAP

Blind Spots Bridged
by the
Wealth Engineering
Platform

What Clients **WANT**

- ✓ Holistic Wealth Solutions
- ✓ Integrated Tech Platforms
- ✓ Advanced HNW Strategies
- ✓ Proactive Family Planning
- ✓ Customized Blueprints

THE WEALTH ENGINEERING MALL OF CAPABILITIES

An Elastic Infrastructure — A Fee-Based Portfolio of White Label, Modular Solutions

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

Advanced Strategies

Marketing brochures, booklets, presentations and HNW strategy toolkits

Practice Engineering

Syncing practice ecosystems with HNW family and business wealth ecosystems

Coaching & Training

High-touch coaching, training, case design and ongoing advisory support

WealthTech Dashboard

Virtual MFO platform — organize, store, track, collaborate, activate, transmit

Expert Sourcing

Best-of-breed expert sourcing firms amplify perpetual value of advisory firms

Professional Designations

ChWE • ChCCA • ChFOA — Credentialing for TopTier wealth advisory professionals

HARMONIZED WEALTH - DIGITAL SYNCHRONIZATION

High-Touch Wealth Advisory *FUSED WITH* High-Touch Wealth Tech
- The Ultimate Virtual HNW Wealth Advisory Platform -

FIRM-CENTRIC TECHNOLOGY

- ▶ RIA & Broker/Dealer Platforms
- ▶ Accounting Firm Tools
- ▶ Insurance Agency Systems
- ▶ Law Firm Integrations
- ▶ Dashboard Sidebars & APIs
- ▶ APPs & Custom Integrations

***FUSION
POWER***

FAMILY-CENTRIC TECHNOLOGY

- ▶ Private Family Trust Companies
- ▶ Directed Trusts
- ▶ Family Limited Partnerships
- ▶ Virtual MFO Dashboard
- ▶ Organize • Track • Collaborate
- ▶ Everyone • Anytime • Anywhere

THE FIVE CORE FORMS OF CAPITAL – FusionPower

Personal Capital

Ownership • Control • Use
Income & assets we can spend or
leave to others

Taxable Capital

No Control • No Ownership • No Use
Income and assets we must give up
through taxation

FAMILY CAPITAL

The Core



Business Capital

UNIQUE Ownership • Control • Use
More income and assets we can use
and leave to others

Charitable Capital™

More to Control • More to Use
More income and assets we can
use, control and leave to others

PROFESSIONAL DESIGNATIONS

The Wealth Engineering Institute
Governing Body & Grantor of Professional Designations

ChWE

Chartered Wealth Engineer

The premier credential for holistic wealth engineering professionals mastering the full wealth management spectrum.

ChCCA

**Chartered Charitable Capital
Advisor**

Specialized expertise in charitable capital strategies, planned giving and philanthropic wealth optimization.

ChFOA

Chartered Family Office Advisor

Advanced proficiency in multi-family office structures, family enterprise management and legacy planning.

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

Providing 'Flex and Balance' — Maintaining 'Choices of Options'

TAKE THE NEXT STEP



MASTER THE MAZE

Raise Your Game - Convert From Checkers To Chess

Nick@MyWEHub.com • 407.878.3520 • National HQ: Orlando, Florida • MyWEHub.com