The WEALTH ENGINEERING Hub

Home of The “Fusion*Powered* Advisor”

Holistic Fee-Based/AUM Solutions Providers

HIGH TOUCH WEALTH ADVISORY

Digitally Synchronized • Harmonized Interaction

The Wealth Engineering Dashboard

Serving the Wealth Advisory Community Since 1996 | Orlando, Florida | 407.878.3520

THE FUSION*POWERED* ADVISOR –*THE SEISMIC SHIFT*

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?

Advisors can transform from "AUM/Product Providers" to "Holistic Fee-Based Solutions Providers"

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

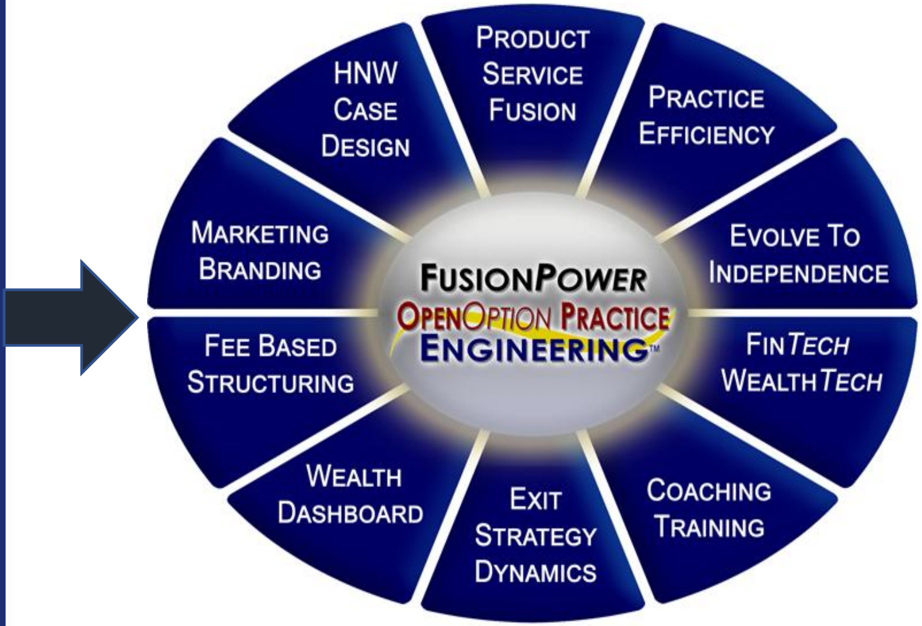
A SEISMIC SHIFT

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

THE OPEN*OPTION* PRACTICE ENGINEERING PLATFORM

Open*Option* 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 client wealth ecosystems
- ▶ Custom designed success blueprints
- ▶ Dream engineering interfaced with competent advise
- ▶ Monitored and refined as needed



THE WEALTH ENGINEERING FAMILY OF BRANDS

WealthAdvisorsHub™

EBenefitsHub

MyWealthHub

FamilyBusinessHub

The CharitableCapital™ Design Center

Give Back Nation
Your Giving & Fundraising Hub

The WealthEngineering™ Institute
Engineering dreams into life™

The EBenefitsPEP

Boomer Lifestage Coaching

My Insurance Hub

CyberPrivacyHub

Give@Work

FinancialEngineering for Pro Athletes
Engineering Dreams Into Life

THE "MALL" OF WEALTH ENGINEERING

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

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

Source: Spectrem Group Research (11/1/21)

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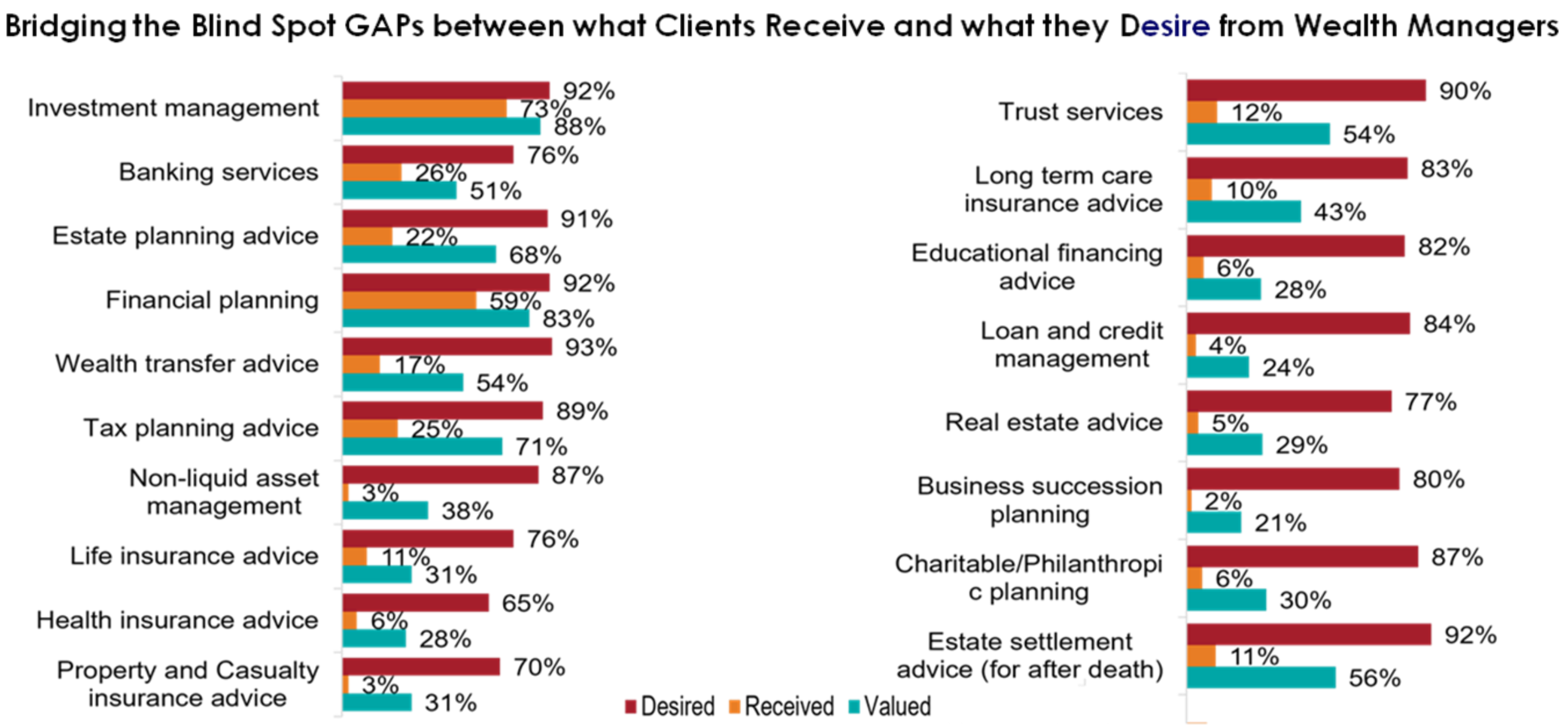
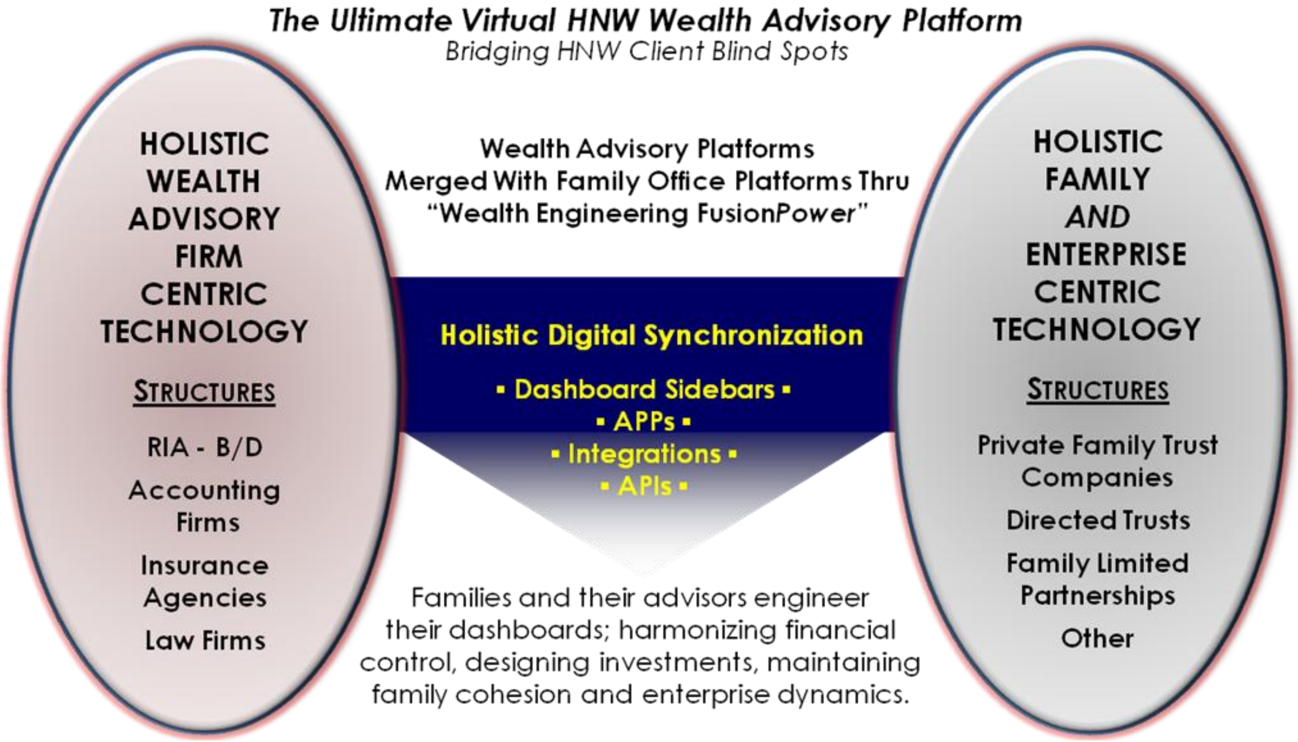
BRIDGING THE HNW CLIENT BLIND SPOT GAPS



THE ULTIMATE HNW WEALTH ADVISORY PLATFORM



WEALTH ENGINEERING - *A HOLISTIC STRUCTURE*

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 Top*Tier* wealth advisory professionals

HARMONIZED WEALTH - DIGITAL SYNCHRONIZATION

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

- The Ultimate Virtual HNW Wealth Advisory Platform -

ADVISORY 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

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

THE FIVE CORE FORMS OF CAPITAL – Fusion*Power*

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

MAKE YOUR SEISMIC SHIFT WITH EASE

ACCESS THE FREE *E*BOOK

[The_Seismic_Shift_Within_High_Net_Worth_Wealth_Advisory.pdf]

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