

**Summer Conference**  
**June 18-20**

**Fall Conference**  
**October 1-3**

**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**  
**WEALTH ENGINEERING™**  
**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



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

### **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 10/1/2024

**Estimated Amounts**

<b>Number of RIA/MFO/CPA Firms</b>	<b>2,178</b>
<b>Number of B/D Firms</b>	<b>22</b>
<b>Total AUM</b>	<b>\$428 Billion</b>
<b>Total Firm Client Net Worth</b>	<b>\$9.5 Trillion</b>
<b>Number of "Wealth Advisors"</b>	<b>13,700</b>
<b>Monthly Retainer Fee Range/Firm</b>	<b>\$300 to \$12,500</b>
<b>Monthly Retainer Fee - Average/Firm</b>	<b>\$678.00</b>
<b>Total Annual Retainer Fee (2023)</b>	<b>\$14,477,000</b>

**Firm Groupings by AUM Size**

<b>AUM Range</b>	<b>Firm#</b>	<b>Total AUM</b>
\$5B - \$17B	6	\$ 58 Billion
\$1B - \$ 5B	12	\$ 36 Billion
\$500M - \$1B	114	\$ 54 Billion
\$250M - \$500M	768	\$ 251 Billion
\$ 75M - \$250M	242	\$ 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**

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## The 365/24/7 Expert Sourcing Consortium Showcasing Summary

▪ **Firms Brand, Position and Embed Within The Dense Fabric of Our Wealth Advisory Consulting Ecosystem** ▪  
2,170+ RIAs with \$420 Billion+ in AUM & 11,400+ Advisors ▪ 22 B/Ds with 2,300+RRs ▪ Insurance Pros ▪ CPA Firms ▪ MFOs  
***A Bundled Showcasing Portfolio: Continuous “Wave Marketing” coupled with Spring and Fall Conferences***

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### Exclusive Endorsement By Advisory/Technology Category

- Present (45 Minutes) and Exhibit at Summer and Fall National Conferences:  
Limited to 150 Top-Tier Wealth Advisors (Waitlist) ▪ Cross-pollinate with other ES Partner Firms  
All in one ballroom ▪ No breakout sessions ▪ All presentations recorded ▪ Interview sessions  
[weconferences.com](http://weconferences.com)
- Initial Press Release issued introducing each new Expert Sourcing Partner Firm.
- Regularly Scheduled Podcasts - Two “Showcase Topic Podcasts/Webinars” per Firm 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

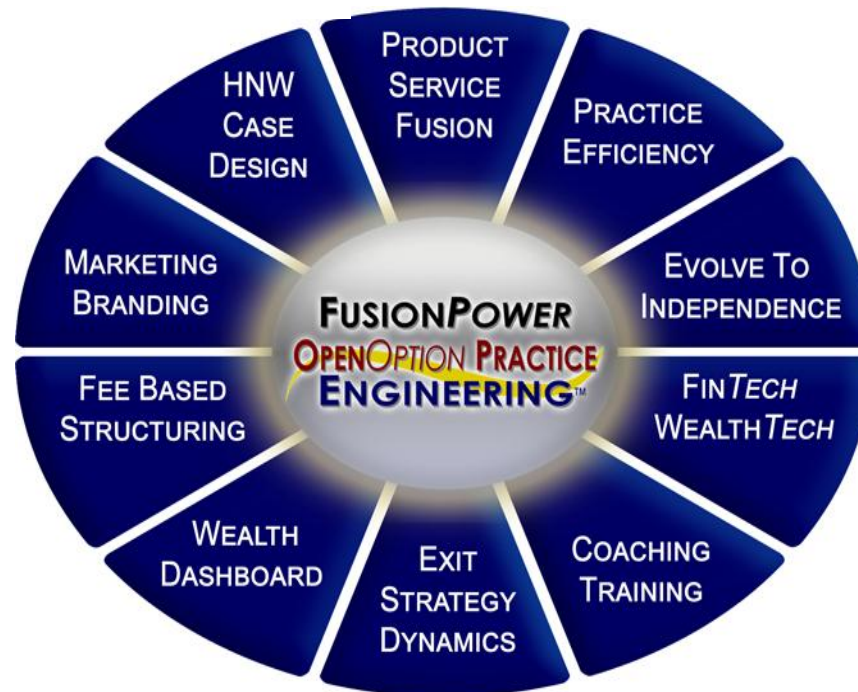
"Recalibrating advisory practice ecosystems to enhance success"

### 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 ENGINEER - ChWE**

[MyWEhub.com](http://MyWEhub.com)

**WE Mastermind Groups Within Each Region**

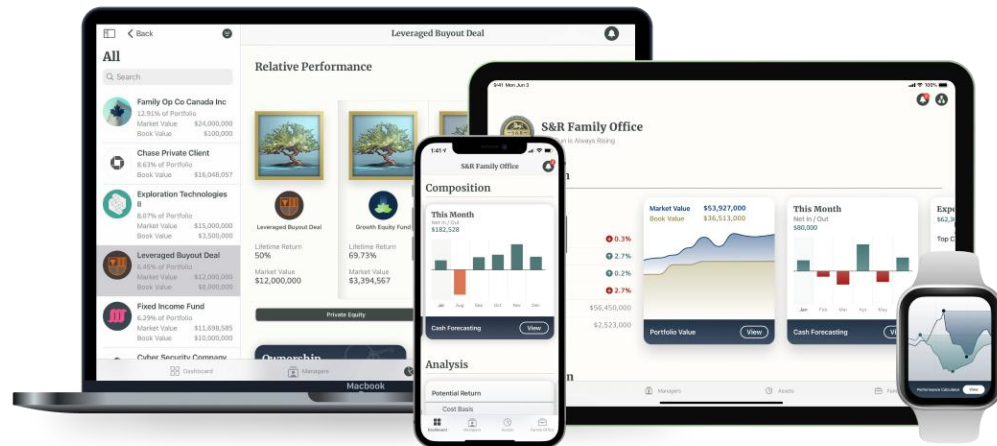


**Raise Your Game To Align With**  
Businesses • Business Associations ▪ Franchises • Family Enterprise Centers



## Expert Sourcing Consortium Showcasing Portfolio EXAMPLES

▪ 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**

**The FusionPower Conference**  
Master The HNW Maze At Scale

**WEALTHENGINEERING**

**Our Exclusive Expert Sourcing Conference Partners**  
*"It Takes A Village"*

The banner has a dark blue background with a faint, light blue grid pattern. The text is in a golden-yellow color. The Wealth Engineering logo is centered in the middle of the banner.

**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 Winter 2025 Conference Website - <https://mywehub.com/conference/>

PRESENTED BY  
**THE WEALTH ENGINEERING INSTITUTE™**

Summary

Agenda

Presenters

Partners

Venue

Registration

LIVE IN ORLANDO - MARCH 26TH THRU 28TH

The FusionPower Conference

*Bridge the Offering GAPS Demanded by HNW Clients to Magnify Success*

*Fuse New-Age Advice, Products and Services with Digital Transformation*



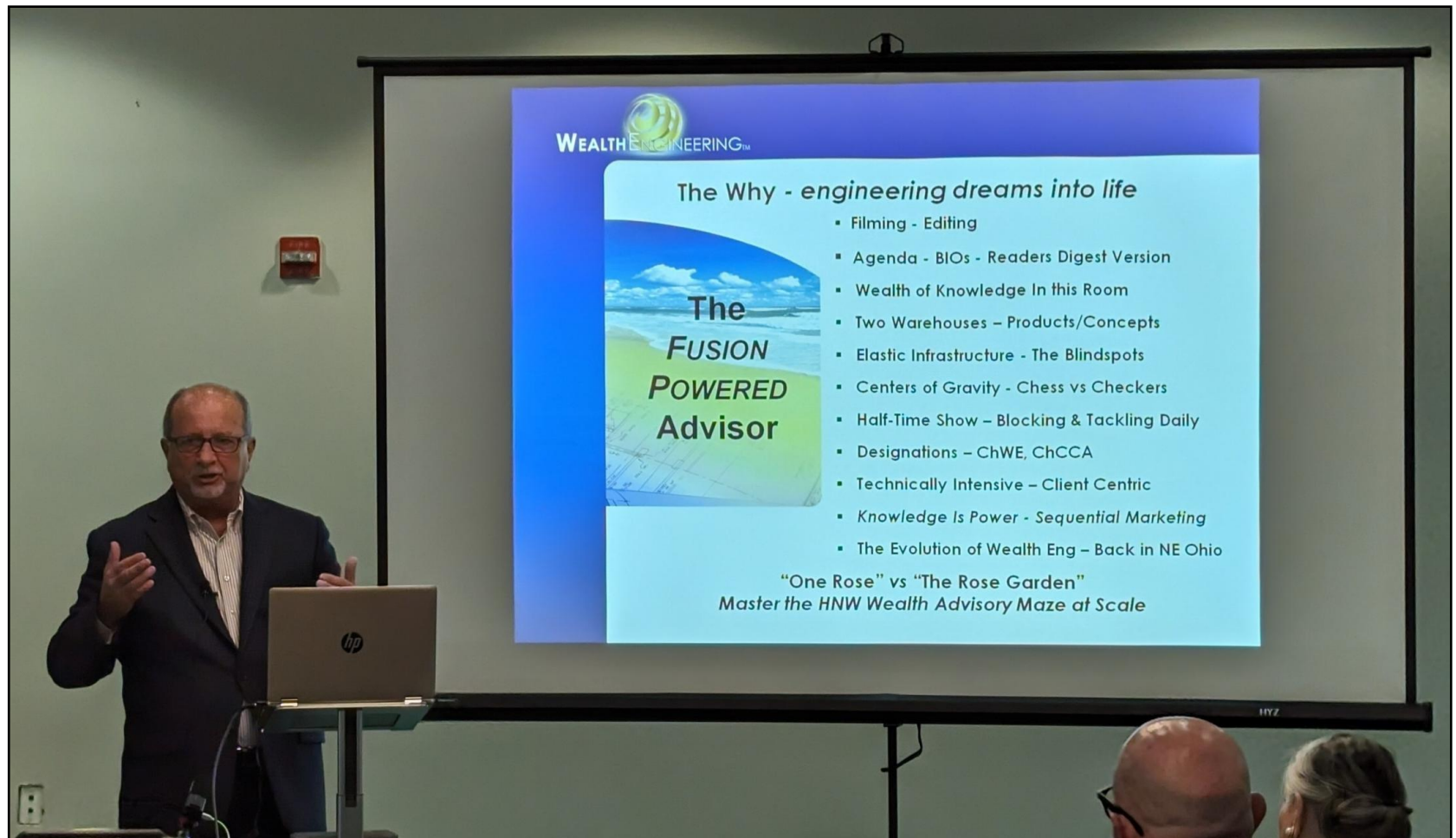
Raise Your Game - Convert From Checkers To Chess

*Get Your Backstage Pass To Holistic Learning*

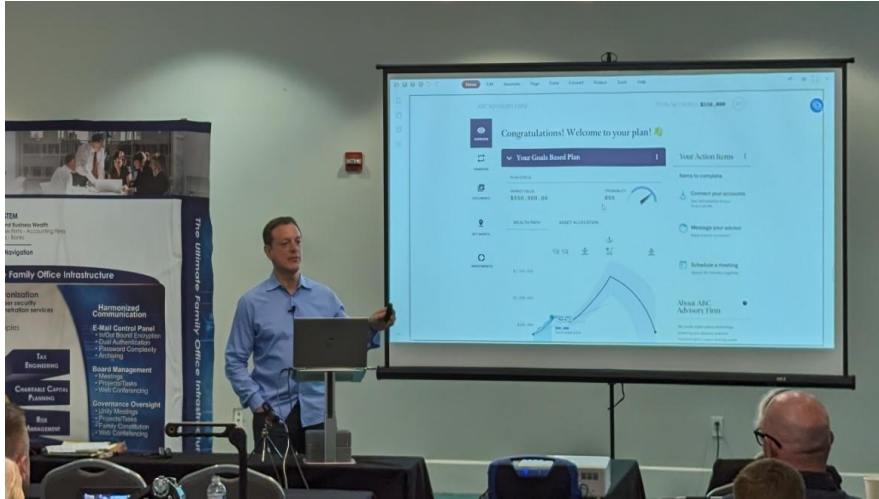


## Kicking-Off the Winter 2025 FusionPower Conference

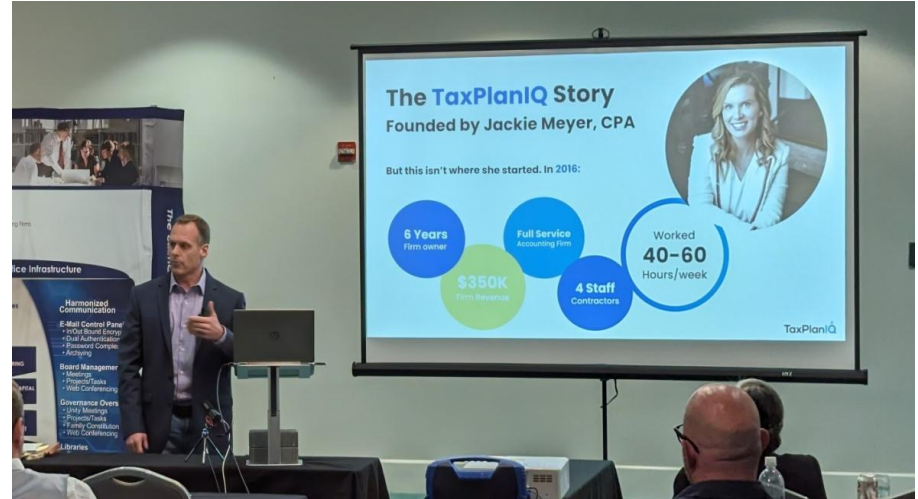
Nick Gregory, ChWE - CEO & Founder of The Wealth Engineering Family of Companies



**Spring 2024 WE FusionPower Conference – Selected Presenters**



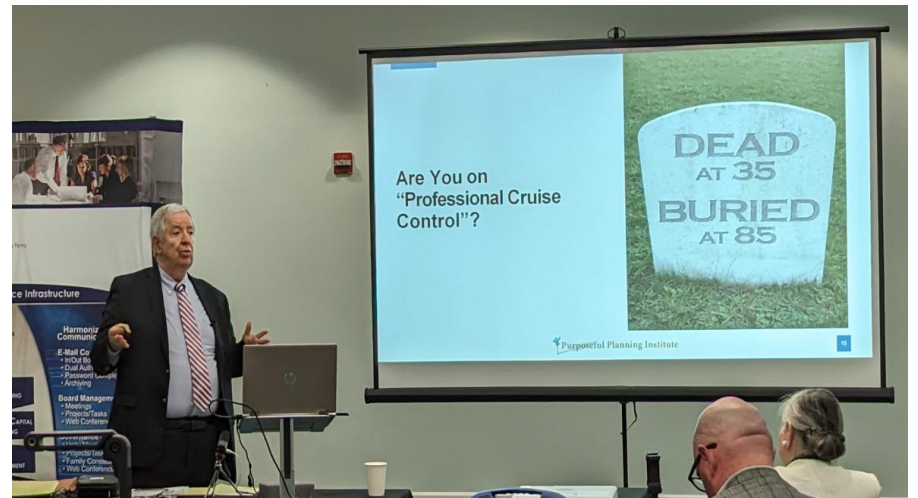
**Rich Cancro, CEO of AdvisorEngine**



**Dave Lukas, CEO of TaxPlanIQ**



**Ken Bero, CMO of Quist Insights**



**John Warnick, JD, Founder of Purposeful Planning Institute**



## WE Spring and Fall National Conference LinkedIn Post Invitations

### Sample LinkedIn Post Format

Orlando  
February  
10th - 12th

PRESENTED BY  
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**The Winter  
FusionPower  
Conference**

Selected Presenter  
Parker Ence  
Founder & CEO  
Jump Advisor AI

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

Orlando  
May  
19th - 21st

PRESENTED BY  
THE WEALTH ENGINEERING INSTITUTE™



**The Spring  
FusionPower  
Conference**

Selected Presenter  
John A. Warnick  
Chairman  
Purposeful Planning Institute

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with High-Touch Wealth Tech.

Orlando  
February  
10th - 12th

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**The Winter  
FusionPower  
Conference**

Selected Presenter  
Ryan Morrison  
CEO  
Smartdata

Become A FusionPowered Advisor  
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with High-Touch Wealth Tech.

Orlando  
May  
19th - 21st

PRESENTED BY  
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**The Spring  
FusionPower  
Conference**

Selected Presenter  
Rob Merl  
Managing Director  
BDO Alliance USA

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



The WE FusionPower Podcast Series – Podcasts Exclusive to Expert Sourcing Firms  
Sample LinkedIn Post Formats – Podcasts - Interviews

**Our Fall Wealth Engineering Conference**  
VIDEO QUIK-TAKE INTERVIEW SERIES - KEY PRESENTERS



**WEALTHENGINEERING**

**Tom Takasaki**  
National Practice Manager  
BDO CPA Alliance




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

**Our Spring Wealth Engineering Conference**  
VIDEO QUIK-TAKE INTERVIEW SERIES - KEY PRESENTERS



**WEALTHENGINEERING**

**Mitch Morrison**  
CEO and Founder  
Eyeballs Financial




**WEALTHENGINEERING**  
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**WEALTHENGINEERING™**  
**Press Release LinkedIn Posts**

*For Immediate Release*



***H2CYBER Joins The WE 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*



***QUIST Joins The WE Expert Sourcing Consortium***

***It Takes A Village***

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**WEALTHENGINEERING**

**An Elastic Infrastructure For Managing Total Wealth**

*Bridging the "Client Offering GAPS" demanded by HNW Families and Businesses*





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*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



**WEALTHENGINEERING™**  
**FUSIONPOWER**  
*Diversify into a true  
Wealth Management Dimension*



 **THE CHARITABLE CAPITAL™**  
DESIGN CENTER

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



**MyWealthHub**

**The Wealth Engineering Family of Companies**

National Headquarters — Orlando Florida • Nick@MyWEHub.com • 407.878.3520  
[MyWEHub.com](http://MyWEHub.com) ♦ [MyCharitableCapital.com](http://MyCharitableCapital.com) ♦ [MyWealth-Hub.com](http://MyWealth-Hub.com) ♦ [MyFamilyBusinessHub.com](http://MyFamilyBusinessHub.com)