

**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**  
**WEALTHENGINEERING™**  
**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 Offering 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 1/01/2025

**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>\$480 Billion</b>         |
| <b>Total Firm Client Net Worth</b>         | <b>\$9.5 Trillion</b>        |
| <b>Number of "Wealth Advisors"</b>         | <b>13,700</b>                |
| <br><b>Monthly Retainer Fee Range/Firm</b> | <br><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**

Fall Conference  
October 22-24



2026 Conference Dates  
Feb. 25-27 June 24-27 Oct. 21-24

## 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 \$480 Billion+ in AUM & 13,700+ Advisors ▪ 22 B/Ds with 2,300+RRs ▪ Insurance Pros ▪ CPA Firms ▪ MFOs  
***A Bundled Showcasing Portfolio: Continuous “Wave Marketing” coupled with Three Conferences Annually***

---

### Exclusive Endorsement By Advisory/Technology Category

***- Present (45 Minutes) and Exhibit at Winter, Summer and Fall National Conferences -***

Limited to 150 C-Suite Execs and 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**

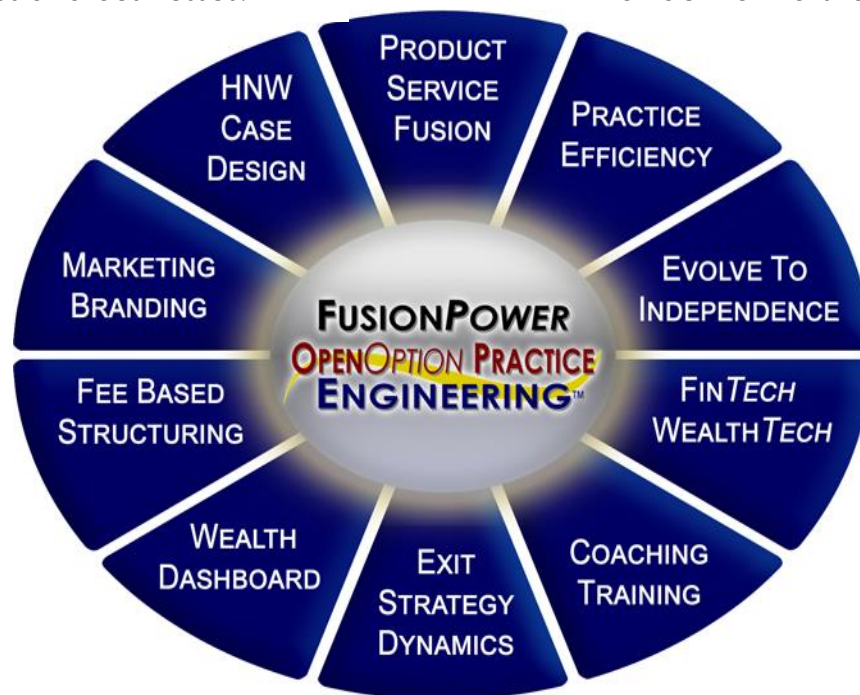
"Recalibrating advisory practice ecosystems to enhance success"

### **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

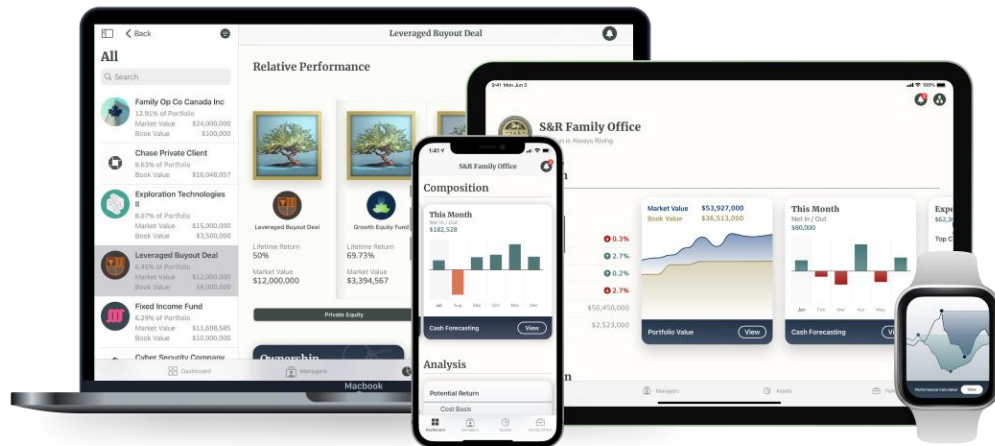


**Raise Your Game To Align With**  
Businesses • Business Associations ▪ Franchises • Family Enterprise Centers



## 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**



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

PRESENTED BY  
 **THE WEALTH ENGINEERING INSTITUTE™**

[Summary](#) [Agenda](#) [Presenters](#) [Partners](#) [Venue](#) [Registration](#)

**LIVE IN ORLANDO - OCTOBER 22ND - 24TH**  
**The FusionPower Wealth Advisor Conference**  
*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*



## Kicking-Off the Winter 2025 FusionPower Conference

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

The slide content is as follows:

**WEALTHENGINEERING™**

**The Why - *engineering dreams into life***

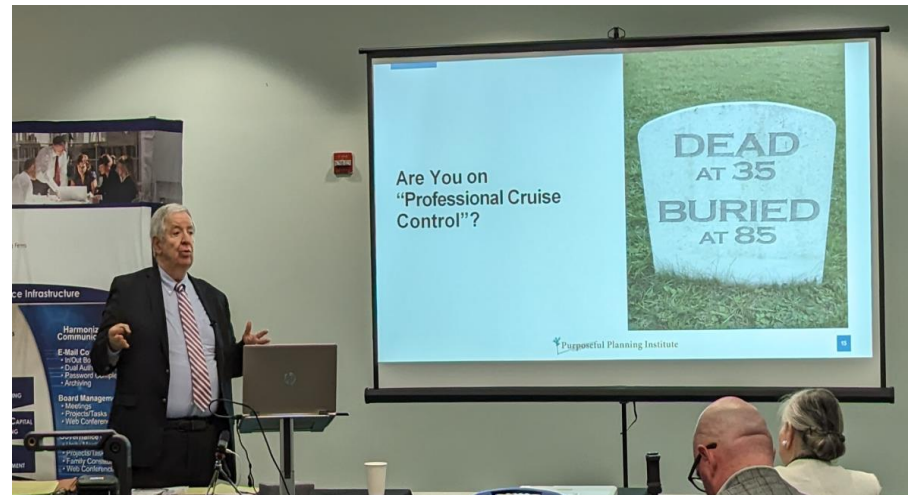
- Filming - Editing
- Agenda - BIOs - Readers Digest Version
- Wealth of Knowledge In this Room
- Two Warehouses – Products/Concepts
- Elastic Infrastructure - The Blindspots
- Centers of Gravity - Chess vs Checkers
- Half-Time Show – Blocking & Tackling Daily
- Designations – ChWE, ChCCA
- Technically 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*



## Winter 2025 WE FusionPower Conference – Selected Presenters





## WE Spring of 2024 National Conference LinkedIn Post Invitations

*Sample LinkedIn Post Format*

Orlando  
May  
19th - 21st

PRESENTED BY  
 THE WEALTH ENGINEERING INSTITUTE™



Selected Presenter  
John A. Warnick  
Chairman  
Purposeful Planning Institute

# The Spring FusionPower Conference

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

Orlando  
May  
19th - 21st

PRESENTED BY  
 THE WEALTH ENGINEERING INSTITUTE™



Selected Presenter  
Rob Merl  
Managing Director  
BDO Alliance USA

# The Spring FusionPower Conference

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

**THE FUSIONPOWER PODCAST SERIES**

**HOST**  
**Nick Gregory**  
CEO  
The Wealth Engineering Hub

**WEALTHENGINEERING™**

**Special Guest**  
**F. James Tennies**  
President  
InCap Group, Inc.

**How To Buy, Sell, Merge and Grow Your Wealth Advisory Firm, On Your terms**

**Special Guest**  
F. James Tennies - President of InCap Group, Inc.

**INCAP GROUP, INC.**

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**  
**Mark Gilbert**  
CEO & Co-Founder  
Zocks

**Embedding Your AI Central Communication Hub Into Your Wealth Advisory Practice**

**Special Guest**  
Mark Gilbert - CEO and Co-Founder of Zocks

**zocks**

Industry leaders fusing advanced knowledge, services, concepts, products and practice management tooling with sound engineering principles.

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

*For Immediate Release*



***InCap Group 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*



***Trayecto 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*



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

**LIVE IN ORLANDO - MARCH 26TH - 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*



**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

---

**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)