A FLYOVER

THE WEALTH ENGINEERING
EXPERT SOURCING CONSORTIUM PROGRAM

An elastic infrastructure of carefully selected oursourced firms fused into the dense fabric of the WE Universe of Top*Tier* 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.

WealthEngineering™

Home of Fusion*Powered Wealth* Advisory

▪ *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".

<u>Our Wealth Engineering Community</u>

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

WealthEngineering™

The WE Fusion*Powered* Sandbox

Engineered over the past 44+ years

RIA/MFO/CPA/BD Firm Clientele Analysis

As of 1/01/2025

WealthAdvisorsHub™

The CharitableCapital™ Design Center

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, marketig and case design**

Future-Proofing Wealth Advisory Practices in the New Age - *Modernizing wealth advisory platforms thru digital transformation*

Estimated Amounts

Number of RIA/MFO/CPA Firms	**2,178**
Number of B/D Firms	**22**
Total AUM	**$480 Billion**
Total Firm Client Net Worth	**$9.5 Trillion**
Nunber of "Wealth Advisors"	**13,700**
Monthly Retainer Fee Range/Firm	**$300 to $12,500**
Monthly Retainer Fee - Average/Firm	**$678.00**
Total Annual Retainer Fee (2023)	**$14,477,000**

Firm Groupings by AUM Size

AUM Range	Firm#	Total AUM
$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.

MyWealthHub

The WealthEngineering™ Institute *Engineering dreams into life.*

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

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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

- **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 Open*Option* Practice Engineering Ecosystem

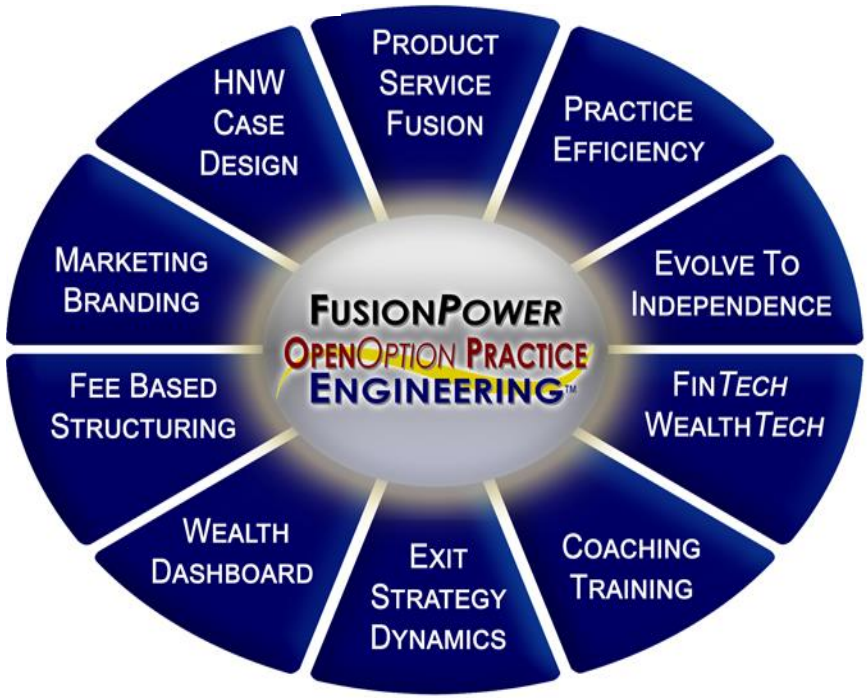
"Recalibrating advisory practice ecosystems to enhance success"

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

WEALTHENGINEERING™

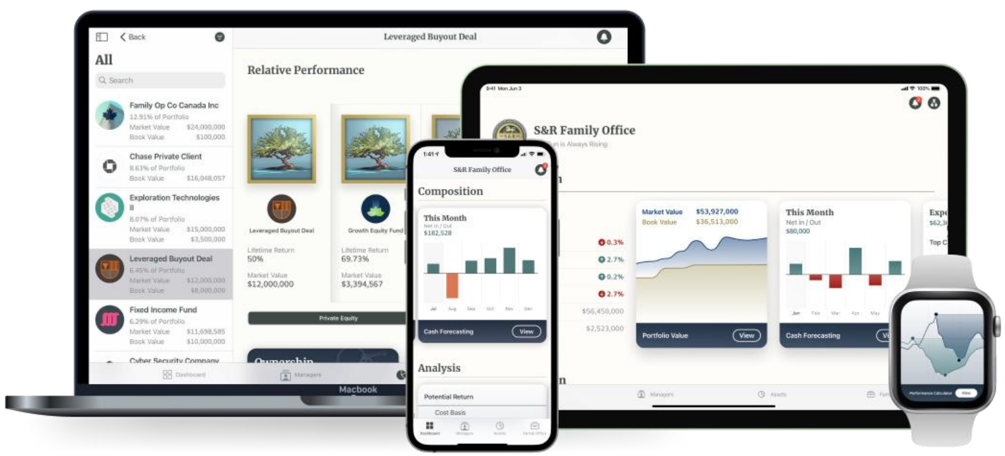
WE Mastermind Groups Within Each Region

Raise Your Game To Align With

Businesses • Business Associations ▪ Franchises • Family Enterprise Centers

Expert Sourcing Consortium
Showcasing Portfolio
<u>EXAMPLES</u>

▪ 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

<u>A Vast Digital Library For Top*Tier Wealth* Advisors</u>

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/

WealthEngineering™

Home Page of Fall 2025 Conference Website - https://mywehub.com/conference/

Kicking-Off the Winter 2025 Fusion*Power* Conference

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

WEALTHENGINEERING™

Winter 2025 WE Fusion*Power* Conference – Selected Presenters

WE Spring of 2024 National Conference Linkedin Post Invitations

Sample Linkedin Post Format

The WE Fusion*Power* Podcast Series – Podcasts Exclusive to Expert Sourcing Firms

Sample Linkedin Post Formats – Podcasts - Interviews

WEALTHENGINEERING™

Press Release Linkedin Posts

WealthEngineering™

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

The Wealth Engineering Family of Companies
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