# **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**





# "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.



#### Home of FusionPowered 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".



#### **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



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# 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 10/01/2025





#### 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.





#### 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





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

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 Two Annual Conferences

#### **Exclusive Endorsement By Advisory/Technology Category**

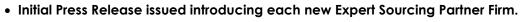
#### **Annual Conferences**

Present (40 Minutes) and Exhibit at Winter and Summer Wealth Advisory Conferences

- Limited to 150 Execs of RIA. CPA. B/D Firms and Top-Tier Wealth Advisors -

Deep cross-pollination - No breakout sessions - Presentations recorded - Interview sessions -

#### weconferences.com



- Regularly Scheduled Podcasts Two "Showcase Topic Podcasts/Webinars" 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 ADVISOR - ChWE

MyWEhub.com



# **WE Mastermind Groups Within Each Region**



Raise Your Game To Align With



# 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
<a href="https://thefei.com/knowledge-center/">https://thefei.com/knowledge-center/</a>



Home Page of Fall 2025 Conference Website - <a href="https://mywehub.com/conference/">https://mywehub.com/conference/</a>





# Kicking-Off the Winter 2025 Fusion Power Conference

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





# Winter 2025 WE FusionPower Conference – Selected Presenters





#### WE Fall of 2025 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







#### **Press Release Linkedin Posts**







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









### The Wealth Engineering Family of Companies

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