

## 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 TopTier 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 12/31/2025



#### 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, marketing and case design**

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

<u>Approximate Amounts</u>	
<b>Total RIA/MFO/CPA/BD Firms</b>	<b>2,138</b>
<b>Number of MFOs</b>	<b>32</b>
<b>- Serving # of Family Offices</b>	<b>1,752</b>
<b>Number of B/D Firms</b>	<b>22</b>
<b>Total AUM</b>	<b>\$480 Billion</b>
<b>Total Client Net Worth</b>	<b>\$9.5 Trillion</b>
<b>Number of “Wealth Advisors”</b>	<b>13,700</b>
<b>Monthly Fee Range/Firm</b>	<b>\$300 - \$12,500</b>
<b>Monthly Fee - Average/Firm</b>	<b>\$678</b>
<b>Total Annual Fees</b>	<b>\$14,477,000</b>

#### RIA Firm Groupings by AUM Size - Total - 1,992

<b>AUM Range</b>	<b>Firm#</b>	<b>Total AUM</b>
<b>\$5B - \$17B</b>	<b>6</b>	<b>\$ 58 Billion</b>
<b>\$1B - \$ 5B</b>	<b>62</b>	<b>\$ 36 Billion</b>
<b>\$500M - \$1B</b>	<b>314</b>	<b>\$ 54 Billion</b>
<b>\$250M - \$500M</b>	<b>1168</b>	<b>\$ 303 Billion</b>
<b>\$ 75M - \$250M</b>	<b>442</b>	<b>\$ 29 Billion</b>

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](http://weconferences.com)



- Initial Press Release issued introducing each new Expert Sourcing Partner Firm.
- 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](http://MyWEhub.com) • [MyWealth-Hub.com](http://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

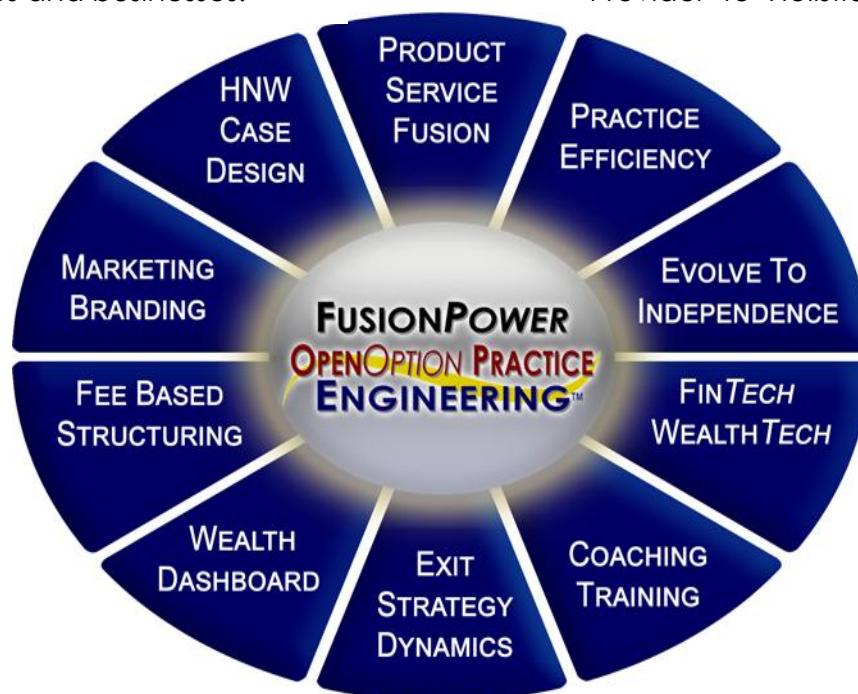
"Recalibrating advisory practice ecosystems to enhance success"

### 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**

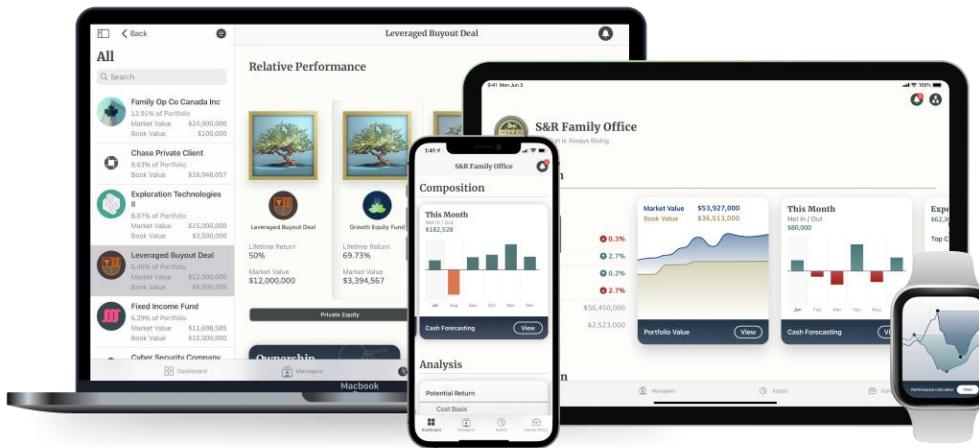
## WE Mastermind Groups Within Each Region



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



## Expert Sourcing Consortium Showcasing Portfolio ▪ 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 background of the slide is a blue-toned architectural blueprint or technical drawing, showing various lines and structures, possibly a floor plan or engineering diagram.

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

The WEALTH ENGINEERING logo, identical to the one at the top of the slide, is positioned in the center of the slide area.

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

**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

A man in a dark suit and glasses is standing at a podium, gesturing with his hands as he speaks. He is positioned to the left of a large projection screen. The screen displays a slide with the Wealth Engineering logo at the top. The main title on the slide is "The Why - engineering dreams into life". Below this, there is a graphic of a landscape with a road and a horizon. To the right of the graphic, the text "The FUSION POWERED Advisor" is written in a large, bold, sans-serif font. To the right of the slide, a list of ten bullet points is displayed. At the bottom of the slide, there is a quote: "One Rose" vs "The Rose Garden" and "Master the HNW Wealth Advisory Maze at Scale".

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

"One Rose" vs "The Rose Garden"  
Master the HNW Wealth Advisory Maze at Scale



## Winter 2025 WE FusionPower Conference – Selected Presenters





## WE Fall of 2025 National Conference LinkedIn Post Invitations

*Sample LinkedIn Post Format*

Orlando  
October  
22nd - 24th

PRESENTED BY  
 THE WEALTH ENGINEERING INSTITUTE™

# The Fall FusionPower Conference

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



Selected Presenter  
Mark Gilbert  
CEO  
Zocks

Orlando  
October  
22nd - 24th

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Selected Presenter  
Evgeniy Yashin  
CEO and Co-Founder  
Holistica



## The WE FusionPower Podcast Series – Podcasts Exclusive to Expert Sourcing Firms

### Sample LinkedIn Post Formats – Podcasts - Interviews





## Press Release LinkedIn Posts

For Immediate Release

**WEALTHENGINEERING**  
**HOLISTICO**  
Wealth Builder

**Holistico Joins Our Expert Sourcing Consortium**

***If 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

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 **CSG PARTNERS**

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WEALTH ENGINEERING™

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](mailto: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)