

Summer Conference
June 18-20



Fall Conference
October 1-3

HOME OF FUSIONPOWERED WEALTH ADVISORY

▪ *High-Touch Wealth Advisory Fused With High-Touch Wealth Tech* ▪

The Wealth Engineering Sandbox – Evolved over the past 44+ years

Encompassing 2,170+ RIAs with 11,400+ Advisors and AUM of \$420+ Billion
\$9.5+ Trillion of Client Net Worth ▪ 22 B/Ds ▪ CPA Firms ▪ MFOs

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



Embrace The Digital Revolution - Bridge Your Blind Spots
"Cut away the bad plumbing of detached digital and manual processes."



Master The HNW Advisory Maze At Scale

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.

A wealth advisory ecosystem synchronized with turnkey modular solutions

Bringing families, their businesses, their advisors and all of their wealth together



THE FUSIONPOWERED ADVISOR ***An unfair advantage***

Fortify your client value proposition by fusing new services, products and technology into your offering; creating fresh revenue and profit silos while enhancing client acquisition and retention, along with leveraging against future uncontrollable, catastrophic events.

MyWEhub.com



Our OpenOption Practice Engineering Sandbox

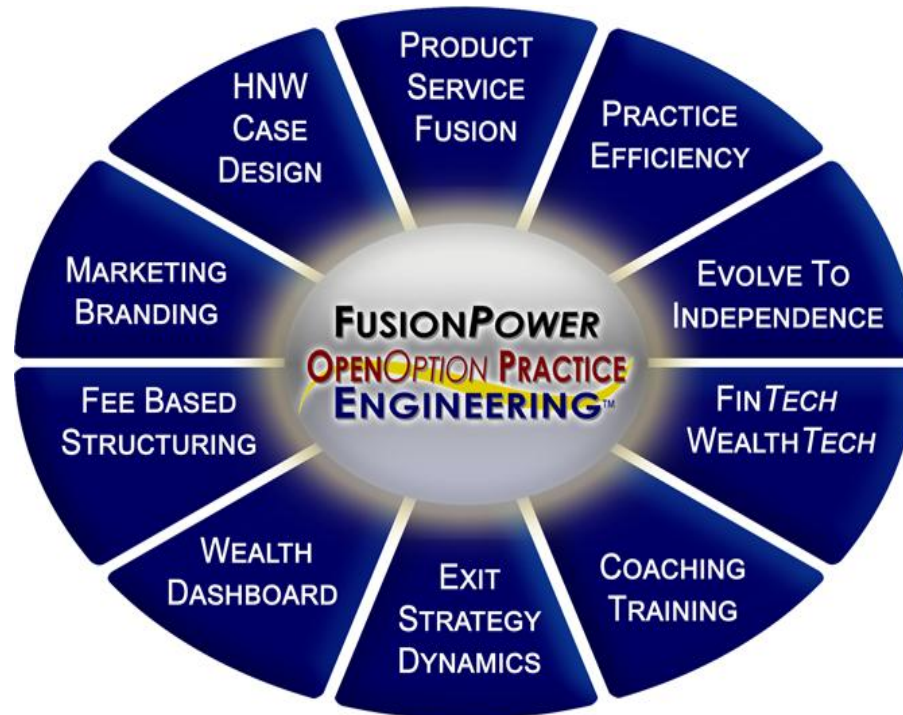
"Recalibrating advisory practice ecosystems to enhance success"

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".



Helping Firms Transform Into A New Wealth Management Dimension To Magnify Success

Helping Rejuvenate The Contours Of Advisory Practices To Become More Agile

MyWEhub.com



An Elastic Infrastructure - Fused together for TopTier Wealth Advisors

HIGH TOUCH WEALTH ADVISORY
Digitally Synchronized • Harmonized Interaction

Advisors separate from the “AUM Herd”; becoming true “wealth solutions providers”

“adding new ingredients to their products and services mixing-bowl”

▪ **Growing Organically thru “NON-AUM” Fee Structures** ▪

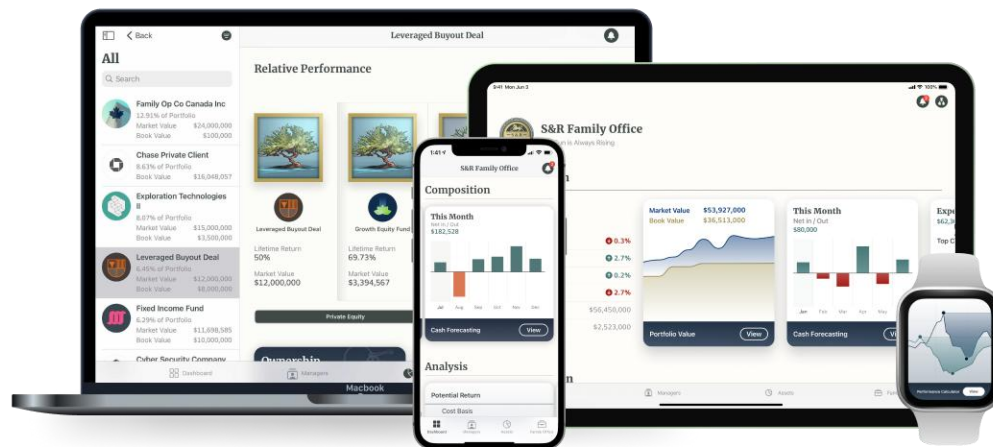
Our Fee-Based Wealth Engineering Mall of Capabilities

A dynamic portfolio of white label, modular solutions comprised of Advanced strategy and marketing brochures, booklets, presentations, etc.

▪ **Supported by high touch coaching, training, marketing and case design** ▪

Monthly Consulting Retainer Fees Range From \$300 to \$12,500

Contingent upon services selected, firm size, etc.





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 Why – Create A Seismic Shift in True Wealth Management
Helping Wealth Managers Bridge Their “HNW Client Offering Blind Spots”**

Bridging the Blind Spot GAPS between what Clients Receive and what they Desire from Wealth Managers

As illustrated By The Spectrem Group Research Chart Below

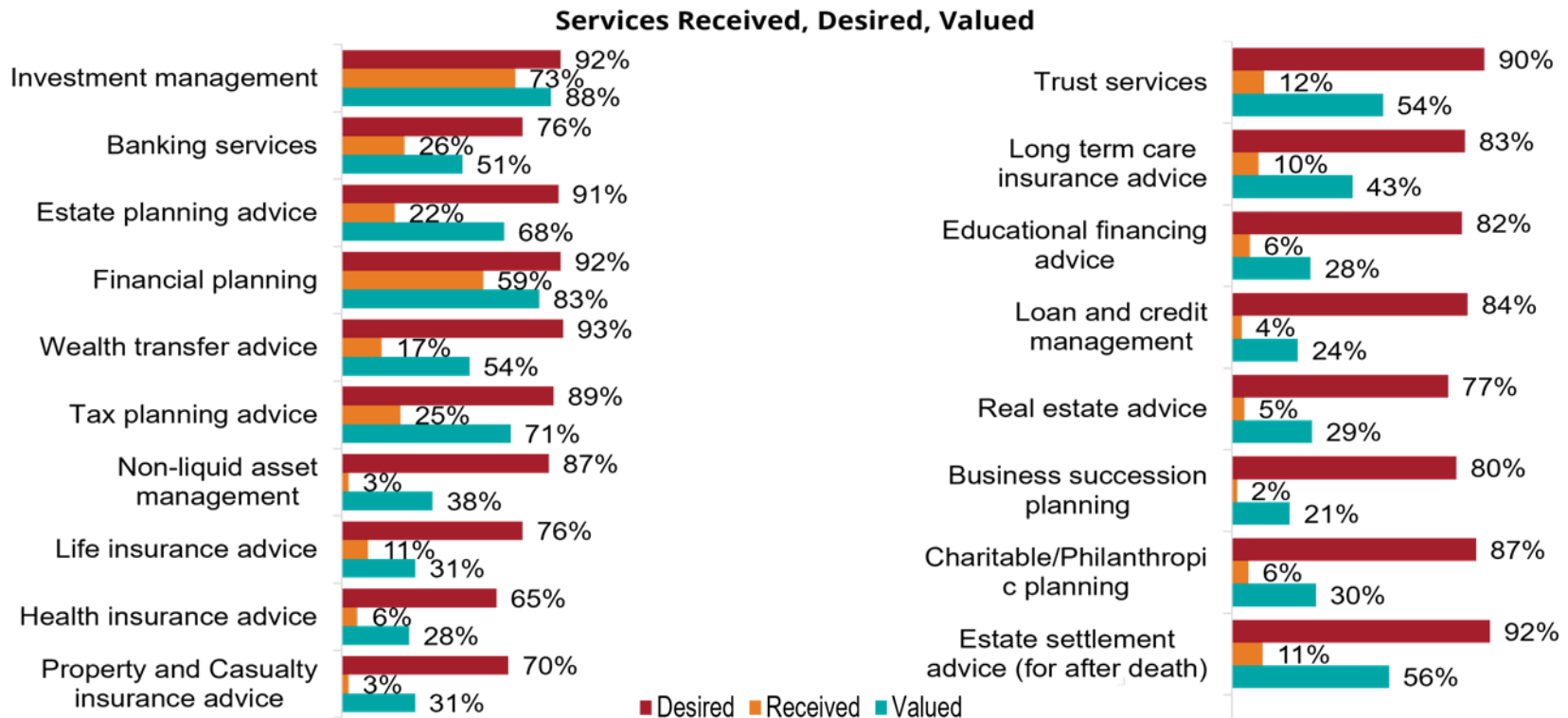
The Solution — The FusionPowered Wealth Advisor

Fusing sound engineering principles with multi-dimensional advice, services, tech and products.

- High-Touch Wealth Advisory Harmonized With High-Touch Wealth Tech ▪
- Coupled with Coaching ▪ Training ▪ Marketing ▪ Case Design ▪ HNW Strategies/Tactics

“Shore-up Wealth Advisory Weak Points”

THE SPECTREM GROUP – WEALTH MANAGEMENT SERVICES “GAPS CHART”*



*Exerpt from the 11/1/21 Spectrem Group Research Article: Focus On What Investors Want

THE
WEALTHENGINEERING™
FAMILY OF COMPANIES

Wealth Engineering Brands



DIVISIONS



The Wealth Engineering Institute

Governing Body and Grantor of the following Professional Designations

CHARTERED FAMILY OFFICE ADVISOR – ChFOA ▪ CHARTERED WEALTH ENGINEER - ChWE

CHARTERED CHARITABLE CAPITAL ADVISOR - ChCCA

MyWEhub.com ♦ MyCharitableCapital.com ▪ MyWealth-Hub.com ♦ MyFamilyBusinessHub.com

Providing “Flex and Balance” – Maintaining “Choices of Options”



Modular Programs selected from the “Mall of Wealth Engineering”

A Concierge Approach – Manuals ▪ Brochures ▪ Booklets ▪ Presentations ▪ Much More

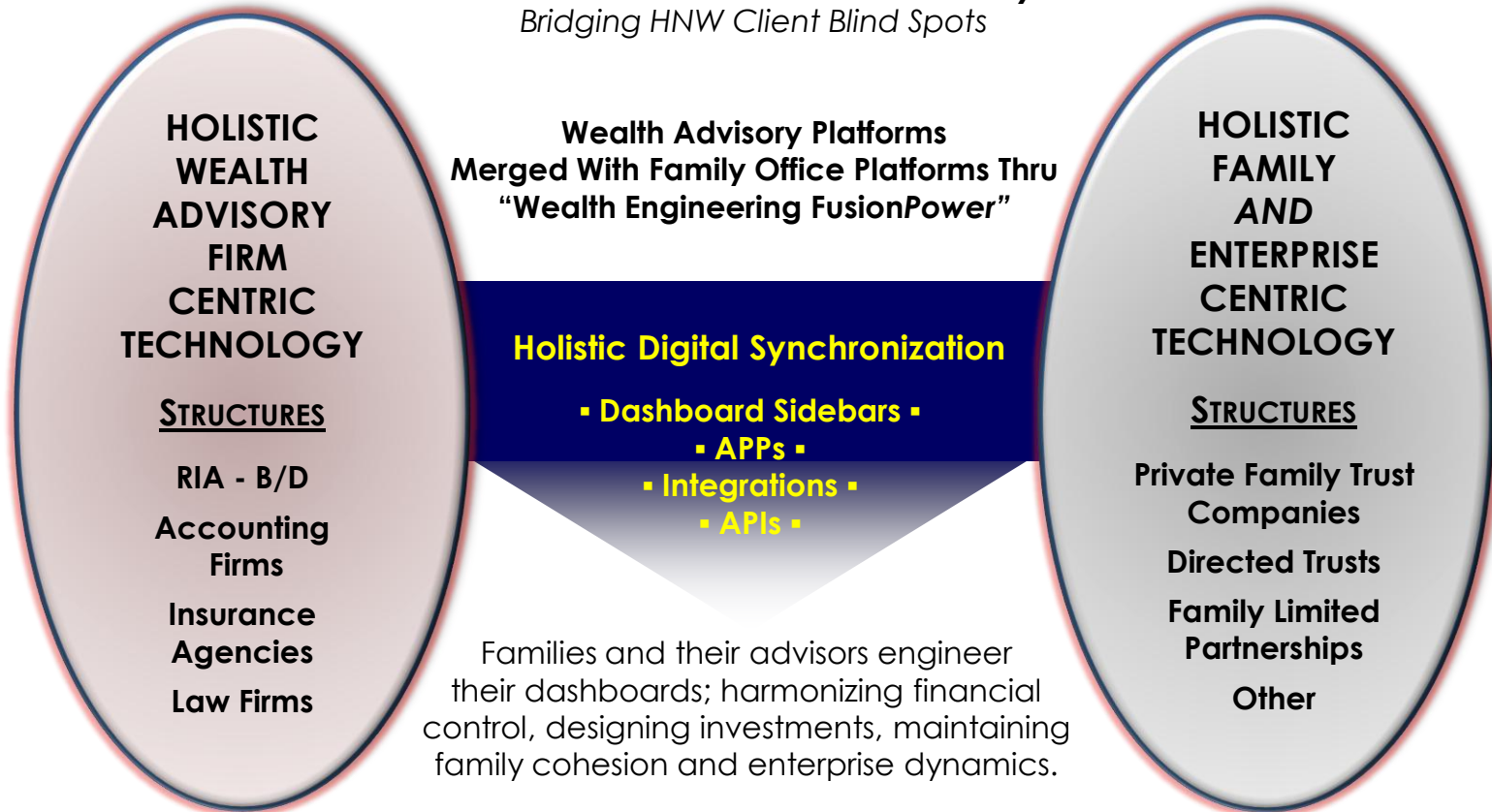
Private Label Solutions — Branded marketing materials supported by coaching, case design and training

- **The Family Wealth Hub Dashboard**
The Ultimate Family and Business Ecosystem Infrastructure
- **Family Business Engineering₃₆₀**
Dealing effectively with their *financial life support systems*
- **EBenefits Engineering for Businesses**
Coordinate employee benefit strategies and tactics effectively
- **Business Transition Engineering**
Transitioning business ownership effectively and efficiently
- **Boomer Life Stage Wealth Coaching™**
Capture Top *Tier* Boomers™ - The Top 9%, HHI of \$150,000+
- **Wealth Engineering for Pro-Athlete and Celebs**
Dealing effectively with their entire *financial ecosystem*
- **Wealth Engineering for Medical Professionals**
Dealing effectively with their *financial life support systems*
- **The Give Back Nation Affiliate Program**
Maximize “community involvement” for Advisors and Clients
- **Charitable Capital™ Planning**
Planned Giving Redefined - The third form of financial capital
- **Turnkey Private Label Trust Services Program**
Powered by a unique trust company and powerful state trust law
- **The Leveraged Executive Loan™**
A alternative to split dollar/deferred compensation design
- **The Family Business Private Insurance Company**
Multiple risk, tax and business planning opportunities
- **Shadow Equity Incentive Benefits™**
Ownership Motivation *without* the Ownership
- **Tax Engineered Accredited Investing™**
A paradigm shift in investment, tax and risk management
- **The Charitable Capital™ Gift Annuity Program (CGA)**
A lifetime of receiving through giving™
- **Leveraged IRA Giving™**
Converting IRA Assets into Charitable Capital™
- **The Family Generational Trust Program™**
Tax deferred investing within a generational trust
- **The Private Income Trust™ Program (PIF)**
Income and tax savings while living - giving at death
- **The Managed Income™ Trust (CRT)**
Management of income, investing, taxation and giving
- **The Private Giving Fund™ (DAF)**
A Private Labeled DAF turnkey platform
- **The Managed Lead Trust™ (CLT)**
Management of income, investing, taxation and giving

In a Sea of Sameness - Brand • Position • Differentiate - Create An Unfair Advantage
“add new ingredients to your wealth advisory mixing-bowl”



The Ultimate Virtual HNW Wealth Advisory Platform
Bridging HNW Client Blind Spots



MyWealth-Hub.com/MyWealthHubVideo4.mp4



The WE Virtual Multi-Family Office Dashboard

checklists and spreadsheets are gone forever

Organize, Store, Track, Collaborate, Activate, Transmit

Everyone • Everything • Anytime • Anywhere

One Touch360 • Total Control • Seamless Navigation

The FamilyWealth Hub™ Dashboard - Design Platform



Example Only – Not reflective of actual Dashboard



2024 Planned Giving Results

Over \$2.3 Billion In Planned Gifts

<u>Key Giving Tools</u>	<u>Ave. Size</u>	<u>Total Contributions</u>
152 Remainder Trusts	\$2.3M	\$349,600,000
55 Lead Trusts	2.7M	148,500,000
26 Pooled Income Trusts	1.9M	49,400,000
3,611 Insured CGAs	258M	931,638,000
17 Leveraged IRA Giving	3.5M	59,500,000
52 Donor Advised Funds	362M	18,824,000

ChCap.org

The Five Core Forms of Capital

FAMILY CAPITAL

TAXABLE CAPITAL

No Control — No Ownership — No Use
Income and assets we must give up through taxation

PERSONAL FINANCIAL CAPITAL

Ownership — Control — Use
Income and assets we can spend or leave to others

BUSINESS CAPITAL

UNIQUE *Ownership — Control — Use*
UNIQUE income and assets we can spend and leave to others

CHARITABLE CAPITAL™

More to Control — More to Use
Increases the amounts of income and assets we use and control

The Family Business Hub

BUSINESS MEMBER BENEFITS

Exclusive Access to
Business Hub Advisors
and
Expert Sourcing Companies
National — Regional — Local
for
Training + Education + Consulting
Services + Products

LOCAL CHAPTERS

Monthly Meetings and Newsletters
Timely Topic Webinars
Business Support Tools
Coordination with regional
Collegiate Family Enterprise Centers

RESULTS

Businesses Built to PREVAIL



MyFamilyBusinessHub.com



WE Mastermind Groups Within Each Region



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



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 ♦ MyCharitableCapital.com ♦ MyWealth-Hub.com ♦ MyFamilyBusinessHub.com