

Eyeballs Financial Joins The Exclusive Wealth Engineering Expert Sourcing Consortium

A client-focused, voice activated custom mobile app for wealth managers

LAKE MARY, FL, USA, March 16, 2023 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce its inclusion of Eyeballs Financial (EF) as an exclusive core component of its Expert Sourcing Consortium. "We are excited to include EF's custom advisor mobile app communication technology" said WE Founder and CEO, Nick Gregory, ChWE. "EF's System, helps us better serve the more than 2,100 wealth management firms and multi-family offices, as well as CPA, B/D, insurance and investment organizations that we consult with nationally."



This voice-activated mobile app delivers instant custodial reporting with the tap of a finger or the sound of a voice on a highly secure platform. Clients are provided the answers to their portfolio

statement questions on 24/7 basis. The custom interactive Eyeballs Advisor app & dashboard documents customers' questions, while providing a direct messaging system to address their concerns. This proprietary platform is the new language of Fintech modernizing the advisor/client relationship. Video Overview:

<https://eyeballsadvisors.com/promo/>

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Advisors can now cut away so much of their client communication wrangling, on-the-fly; no more 'playing phone, text and e-mail tag.'”

Nick Gregory, ChWE

“This brilliantly bundled concierge communication system

will help us bridge the client communication gaps for our wealth advisors as we continue to transform firms into a new wealth management dimension. Wealth managers can magnify their successes and become more agile.” said Gregory. Advisors can now cut away so much of their client communication wrangling, on-the-fly; no more 'playing phone, text and e-mail tag.' Clients have everything they need in one seamlessly aggregated mobile app.”

Mitchell Morrison, Founder and CEO of Eyeballs Financial, "We are grateful and excited to be a part of the Wealth Engineering Family of Companies. We created our patented technology to elevate the client/advisor relationship to a whole new level. Offering client empowerment to quickly get all their investment questions answered immediately, while providing wealth advisors a dashboard with an instant awareness of what clients are thinking. For an advisor, it is a game changer with them being better prepared to address their clients' immediate needs, concerns or investment interest levels."

"In addition, compliance issues may be solved before an issue even begins. Suitability and the fiduciary rule can be fulfilled and resolved through greater transparency when clients use the Eyeballs Financial app on a regular basis."

"Wealth managers are increasingly looking for ways to brand, position and differentiate themselves while showcasing the value they provide," said Morrison. "Providing a custom mobile app is essential in today's fast moving wealth management environment. Our platform provides simplified communication journeys for clients while increasing the value-added and success of wealth management firms."

With this announcement, EF joins the Wealth Engineering arsenal of best-in-class expert sourcing firms that provide a vast array of services and products to Wealth Engineering's network of wealth management firms across the nation. The result is the fusion of advanced knowledge, experience, services, products and technology with sound engineering principles to create a synchronized hub for family and business wealth building.

About Eyeballs Financial, LLC

Eyeballs Financial is the new language of Fintech. The only voice-activated custodial statement mobile app that provides real time investment portfolio information. Clients can now get immediate answers to all their investment questions with the sound of their voice or a tap of a finger. A user-friendly process for the client that also documents their questions, giving an advisor valuable insight into clients' concerns. An industry leader, Eyeballs' proprietary technology is revolutionizing the customer custodial statement and the financial advisor platform. More information is available at: <https://eyeballsfinancial.com> and <https://eyeballsadvisors.com>

About the Wealth Engineering Family of Companies

Over the past 46+ years, the Wealth Engineering Family of Companies has developed a Wealth Advisory Concierge Dashboard. It provides high-touch total wealth advisory; harmonized with high-touch wealth tech partner firms. WE provides a multi-disciplinary portfolio of consulting services for wealth management, multi-family offices, accounting, investment and insurance advisors nationally. WE fuses sound engineering principles with advanced knowledge, services, products and wealth tech to create a synchronized hub for "client wealth building". WE helps advisors deploy new tactics in order to evolve from the HERD of "AUM/Commission Product

Providers" to "Holistic Fee-Based Solutions Providers". WE helps rejuvenate the contours of advisory practices thru a vast array of proprietary modular solutions. WE is also the governing body and grantor of the professional designation - Chartered Wealth Engineer (ChWE). Learn more at: [MyWEHub.com](https://www.mywehub.com)

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