

# The Bancorp Bank Joins The Wealth Engineering Expert Sourcing Consortium

*"This Wealth Advisory centered banking platform will help us continue to transform firms into a new wealth management dimension," -WE CEO Nick Gregory, ChWE.*

ORLANDO, FL, USA, June 5, 2023 /EINPresswire.com/ -- The Wealth Engineering Family of Companies ("WE") is pleased to announce its inclusion of The Bancorp Bank, N.A. ("The Bancorp") as an exclusive core component of its Expert Sourcing Consortium.



"We are excited to include The Bancorp's robust platform," said WE Founder and CEO, Nick Gregory, ChWE. "Its dynamic portfolio of Private Banking services infrastructure helps us better serve the more than 2,170 wealth management firms and multi-family offices, as well as CPA, B/D, insurance, and investment organizations that we consult with nationally. This Wealth

“

The Bancorp aims to help financial professionals provide the best solutions to their clients and this partnership allows us to reach a larger community."

*John Leto, Executive VP, Head of Institutional Banking of The Bancorp*

Advisory centered banking platform will help us continue to transform firms into a new wealth management dimension, magnifying their success by rejuvenating the contours of their practices to become more agile," said Gregory.

Through its Institutional Banking business, The Bancorp partners with independent financial professionals to help offer innovative lending and deposit services to better manage wealth management strategies.

"We are pleased to be a core component of the Wealth

Engineering Expert Sourcing Team," said John Leto, Executive Vice President, Head of Institutional Banking of The Bancorp. "The Bancorp aims to help financial professionals provide the best solutions to their clients and this partnership allows us to reach a larger community.

“Additionally, wealth managers are increasingly looking for ways to showcase the value they provide while differentiating themselves from the competition. The Bancorp’s securities-and-insurance-backed liquidity solutions, advisor financing capabilities, and FDIC-insured deposit programs, offer an arsenal of products financial professionals can leverage, and providing private banking services to support their clients can be quite powerful,” added Leto.

With this announcement, The Bancorp 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 The Bancorp

[The Bancorp Inc.](#) (NASDAQ: TBBK), through its subsidiary, The Bancorp Bank, N.A., provides non-bank financial companies with the people, processes, and technology to meet their unique banking needs. With over 20 years of experience, The Bancorp delivers partner-focused solutions paired with cutting-edge technology for companies that range from entrepreneurial startups to Fortune 500 companies. Through its Fintech Solutions, Institutional Banking, Commercial Lending, and Real Estate Bridge Lending businesses, The Bancorp is the third-largest bank by asset in South Dakota, earning recognition as the #1 issuer of prepaid cards in the U.S., a nationwide provider of bridge financing for real estate capital improvement plans, an SBA National Preferred Lender, a leading provider of securities-backed lines of credit, and one of the few bank-owned commercial vehicle leasing groups in the country. With a company-wide commitment to excellence, The Bancorp is recognized as the top-ranked publicly traded bank with assets between \$5B-\$50B by Bank Director Magazine, a Readers’ Choice Top 50 Employer by Equal Opportunity Magazine and was selected to be included in the S&P Small Cap 600. For more about The Bancorp, visit <https://thebancorp.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 "AUM/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: [Grow@MyWEhub.com](mailto:Grow@MyWEhub.com) [-MyWEhub.com](https://MyWEhub.com) 407.878.3520

Brittany Sibal

The Wealth Engineering Family of Companies

britt@mywehub.com

Visit us on social media:

[Other](#)

---

This press release can be viewed online at: <https://www.einpresswire.com/article/636731492>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2023 Newsmatics Inc. All Right Reserved.