

Oak Street Funding Joins The Wealth Engineering Expert Sourcing Consortium

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[/EINPresswire.com/](https://EINPresswire.com/) -- The Wealth Engineering Family of Companies (WE) is pleased to announce its inclusion of Oak Street Funding (OSF), a First Financial Bank company, as an exclusive core component of its Expert Sourcing Consortium. "We are excited to include OSF's robust funding platform of specialized loan products and services to insurance agencies along with CPA and RIA Firms," said WE Founder and CEO, Nick Gregory, ChWE. "OSF will serve the more than 2,170 wealth management, insurance and

CPA firms that we consult with nationally. OSF 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.



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Rick Dennen, founder and CEO of Oak Street Funding

“Building on our shared legacy of exceptional service to the financial services industry, OSF and WE are poised to unlock new opportunities through this dynamic partnership,” said Rick Dennen, founder and CEO of Oak Street Funding. “This collaboration will empower Financial Services Firms to access the capital they need to meet their short- and long-term growth goals.” As the preferred capital provider for WE, OSF is offering tailored financing solutions for acquisitions, successions, working capital needs, and recapitalizations.

With this announcement Oak Street Funding 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.

Oak Street Funding leaders are available for interviews, bylines and podcasts related to lending and financing topics including working capital, succession planning, acquisitions, debt consolidation and more.

About Oak Street Funding

Indianapolis-based Oak Street Funding, a First Financial Bank company, provides customized financial solutions for businesses in various industry sectors and third-party loan servicing for financial institutions. Oak Street Funding incorporates industry knowledge, easy-to-use technology and exceptional employees to deliver top-quality service and capital products to niche businesses nationwide. With in-house sales, underwriting, and servicing teams, and direct access to the CEO and executive team, Oak Street Funding is well-positioned to meet lending needs of borrowers in all stages of the business life cycle. OakStreetFunding.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).

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