

AdvisorEngine® joins The Wealth Engineering Expert Sourcing Consortium - Master The HNW Wealth Advisory Maze At Scale

ORLANDO, FLORIDA, UNITED STATES, February 20, 2024 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of AdvisorEngine as an exclusive core component of its Expert Sourcing Consortium; synchronizing with our other expert sourcing firms and our elastic infrastructure - FusionPowered Wealth Advisory and OpenOption Practice Engineering Dashboards.



“We are excited to include AdvisorEngine’s dynamic digital wealth platform,” said WE Founder and CEO Nick Gregory, ChWE. “The AdvisorEngine platform will help power the Wealth Engineering Digital Command Center being offered to our universe of 2,125+ TopTier wealth management firms and multi-family offices, as well as CPA and broker-dealer firms that my organization consults with nationally. AdvisorEngine will further enhance our efforts in transforming firms into a true total wealth management dimension; modernizing their practice ecosystems at scale to deepen organic growth and enhance profitability.”

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At AdvisorEngine, we are dedicated to supporting advisory firms working to solve their growth challenges and deliver their excellence at scale,”

AdvisorEngine CEO Rich Cancro

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”.

“We appreciate the warm welcome into The Wealth Engineering Expert Sourcing Consortium,” said AdvisorEngine CEO Rich Cancro. “At AdvisorEngine, we are dedicated to supporting advisory firms working to solve their growth challenges and deliver their excellence at scale, and this is a great opportunity to partner with firms seeking to achieve these goals.”

AdvisorEngine's end-to-end wealth management platform delivers fully integrated technology for advisors, including portfolio management, CRM, client portal, digital client onboarding and business intelligence dashboards. AdvisorEngine's platform is designed ultimately to enhance advisor firm growth, create operating efficiencies, and serve clients better.

AdvisorEngine's Cancro will be a featured speaker at The Wealth Engineering Institute's Upcoming FusionPower Conference, to be held in Orlando, Fla., from May 19th through May 21st.

To register for the event, you can visit: events.thefei.com/

AdvisorEngine has also developed comprehensive integrations with the industry's major custodians and data providers that boost investment advisor control over their client experience and provide holistic views of their client's assets.

Highlights of AdvisorEngine® functionality:□

- Performance reporting: Intuitive performance reporting with benchmarks, combined with household views across custodians and robust configurability
- Fee billing: Press one button and generate all the files you need to deliver to custodians, and quickly bill and reconcile multiple accounts
- Rebalancing capabilities: Once orders are generated, they automatically route to custodians through a FIX interface, with no need to upload or download files
- Account management: Easily track client activities, switch between multiple accounts with a click and get alerts when accounts need attention
- Client portal: Advisors' clients see all their activity and assets across custodians in one place; dynamic portfolio reporting enables advisors to demonstrate their value
- Data visualizations: Actionable business intelligence dashboards that can be tailored for firm principals, operations personnel, or advisors
- CRM: AdvisorEngine delivers a powerful and highly configurable CRM, purpose-built for advisors and their staff

About the Wealth Engineering Family of Companies

Born 46+ years ago, the Wealth Engineering (WE) Family of Companies has evolved through an ecosystem of six affiliated firms to develop an elastic infrastructure for managing total wealth. It includes high-touch wealth advisory harmonized with high-touch wealth tech partner firms. WE provides a multi-disciplinary suite 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 tech to create a synchronized hub for "client wealth building." WE helps advisors grow organically by deploying new tactics and strategies as they evolve from "AUM/Product Providers" to "Holistic Fee-Based Solutions Providers". WE helps rejuvenate the contours of advisory practices through coaching, training,

marketing and HNW case design – FusionPowered Wealth Advisory and OpenOption Practice Engineering™. WE is also the governing body and grantor of the professional designation - Chartered Wealth Engineer (ChWE).

Learn more at: MyWEhub.com Nick@MyWEhub.com 407.878.3520

About AdvisorEngine®

AdvisorEngine powers financial advice that is personal, scientific, and beautiful. Its wealth management technology platform uses smart automation to modernize the advisor experience (AX), the business operations experience (BX), and the client experience (CX). Capabilities include CRM, a portfolio management suite and a client portal. Based in New York, NY, and Raleigh, NC, the AdvisorEngine team strives to fulfill six ideals through their work: camaraderie, clarity, curiosity, creativity, crushing it, and celebration. AdvisorEngine is a wholly owned subsidiary of Franklin Resources, Inc., a global investment management organization with subsidiaries operating as Franklin Templeton and serving clients in over 150 countries. For more information, please visit advisorengine.com and follow us on LinkedIn, Twitter and Facebook.

Brittany Sibal

The Wealth Engineering Family of Companies

[email us here](#)

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