

TaxPlanIQ Joins The Wealth Engineering Expert Sourcing Consortium

ORLANDO, FL, USA, April 10, 2024 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of TaxPlanIQ 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 TaxPlanIQ’s dynamic digital Tax Planning Platform,” said WE Founder and CEO Nick Gregory, ChWE. “The platform will help streamline the tax planning efforts being offered by our universe of 2,150+ TopTier wealth management firms and multi-family offices, as well as CPA and broker-dealer firms that my organization consults with. TaxPlanIQ 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.”

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 are thrilled to partner with The Wealth Engineering Expert Sourcing Consortium,” said TaxPlanIQ CEO Dave Lukas. “At TaxPlanIQ, we are dedicated to supporting advisory firms and their clients by helping them identify and better understand tax savings opportunities.

TaxPlanIQ’s tax planning software delivers a comprehensive tax plan with curated strategies designed to maximize the savings of an individual taxpayer in just a few clicks. The platform ultimately enhances advisor firm growth by adding additional high-value services to their offerings, and allows advisors to serve clients at a higher level.





TaxPlanIQ's Lukas will be a featured speaker at Wealth Engineering Conference, to be held in Orlando in May.

To register for the event, you can visit:

<https://events.thefei.com/>

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With this announcement TaxPlanIQ 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 TaxPlanIQ

TaxPlanIQ (taxplaniq.com) provides advisory firms with the capability to maximize tax savings opportunities for their clients while growing their firm. The company's flagship product provides a way to quickly upload a client's 1040, see curated tax strategies, and develop a customized and strategic tax plan with just a few clicks. Connect with TaxPlanIQ via its [blog](#), Facebook, LinkedIn or Twitter.

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: nick@MyWEhub.com MyWEhub.com 407.878.3520

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