

# Corenology Joins The Wealth Engineering Expert Sourcing Consortium

*The Wealth Engineering Family of Companies is pleased to announce the inclusion of Corenology as an exclusive core component of its Expert Sourcing Consortium.*

ORLANDO, FLORIDA, UNITED STATES, April 18, 2024 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of Corenology 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 Corenology’s dynamic digital Behavioral Financial Assessment Platform,” said WE Founder and CEO Nick Gregory, ChWE. “The platform will help streamline the legacy plan personalization and wealth transfer 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. Corenology 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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One of Corenology’s co-founders, Andrew Howell, will be a featured presenter at The Wealth Engineering Institute’s Upcoming FusionPower Conference, in Orlando, Fla., from May 19th through May 21st.”

*To register for the event, you can visit:  
<https://events.thefei.com/>*

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”.

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"We appreciate the warm welcome into The Wealth Engineering Expert Sourcing Consortium," said Corenology CEO Gretchen Figge.

"At Corenology, we are dedicated to supporting advisory firms; we strive to empower every advisor to help their clients grow their family capital along with their financial capital."

Corenology's behavioral finance assessment platform delivers insights into the views, values, behaviors, and relationships, that comprise an investor's personal and family capital. The platform is designed to help advisors retain current clients and connect with the next generation by facilitating deep, connecting, and meaningful wealth conversations between advisors and clients, and between clients and their families.

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With this announcement Corenology 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 Corenology

COREnology is a software platform designed to help advisors quickly build deep connection with clients by helping them identify who they are, what they value, and what they believe. This empowers them to create a wealth plan that involves optimizing their personal and family capital in addition to their financial capital.

Learn more at: [COREnology.com](http://COREnology.com) or [www.nick@corenology.com](mailto:www.nick@corenology.com).

## 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](mailto:nick@MyWEhub.com) MyWEhub.com 407.878.3520

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