

Quist Valuation Joins The Wealth Engineering Expert Sourcing Consortium

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

ORLANDO, FL, USA, May 2, 2024 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of Quist Valuation 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 Quist’s comprehensive valuation services and software solutions platform,” said WE Founder and CEO Nick Gregory, ChWE. “Their experience and expertise will support the full-service valuation requirements of the Consortium. In addition to providing certified valuations, their software platform, Quist Insights™, will enable advisors to deliver their own estimates of value and business assessments, enhancing advisor value-add to clients and help business owners reach their short and long-term goals. The platform will be offered to 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. Quist 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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Quist’s President, Shina Culberson, will be a featured presenter 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:
<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”.

“We are very excited to be joining The Wealth Engineering Expert Sourcing Consortium and appreciate the warm welcome we’ve received from Nick” said Quist President Shina Culberson. “As a 40-year-old independent valuation firm, we bring deep experience and expertise, a credentialed staff of experts, and software solutions that address the growing and changing needs of businesses and their Advisor Partners. We have a deep commitment to deliver valuations and solutions that have integrity and quality,” said Culberson.

Quist’s valuation offerings include certified valuations for specific business requirements as well as software tools enabling and empowering owners and Advisors to conduct their own estimates of value and get actionable insights on how they can improve their businesses. Culberson added, “In addition to delivering work product that has withstood the intense scrutiny of governmental and legal review, our software valuation and planning tools provide Advisors and business owners the critical information they need to make better decisions and increase the value of their business. We are looking forward to working with the WE and its advisor community.”

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With this announcement Quist Valuation 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.

About Quist

Located in Boulder, CO and founded in 1984, Quist Valuation is a leading independent valuation firm. We have completed over 10,000 valuations. Our team of credentialed professionals, established business processes and software solutions, enable Quist to deliver solutions throughout the entire cycle of business ownership and operation. Our full-service valuations and consulting services address the needs and requirements of business growth, legacy planning, and eventual exit. Our software platform, Quist Insights™, enables business owners and their advisors the ability to conduct their own estimates of value, identify and measure business risk and performance, compare to market parameters and generate actionable recommendations to enable better decisions and accelerate the value of their business. Learn more at: QuistValuation.com or contact Ken Bero, kbero@QuistInsights.com or 978-996-8337.

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

Brittany Sibal
The Wealth Engineering Family of Companies
britt@mywehub.com

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