

Gladstone Group Joins The Wealth Engineering Expert Sourcing Consortium

The Wealth Engineering Family of Companies announces the inclusion of Gladstone Group as an exclusive core component of its Expert Sourcing Consortium.

ORLANDO, FLORIDA, UNITED STATES, July 9, 2024 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of Gladstone Group 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 Gladstone’s comprehensive M&A advisory, valuation, and executive search services,” said WE Founder and CEO Nick Gregory, ChWE. “Gladstone’s expertise and proven approach helps wealth and investment management firms make sound business decisions whether to buy, sell, or merge to achieve viability and growth. Gladstone’s services 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. Gladstone 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 and value.”

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Nick Gregory, CEO of The Wealth Engineering Family of Companies

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Based/AUM Solutions Providers,” while streamlining technology and bridging “HNW Client Offering Blindspots”.

“We appreciate the warm welcome into The Wealth Engineering Expert Sourcing Consortium and contributing our expertise to their impressive network of wealth management firms,” said Dan Kreuter, founder and CEO of Gladstone Group. “At Gladstone, we are dedicated to supporting advisory firms; we strive to empower advisors to make informed decisions about their future, whether they’re interested in buying, selling, merging, or strategically growing their practice.”

“Our commitment to delivering trustworthy advice, timely, relevant insights and fostering meaningful industry connections ensures that advisors can trust Gladstone to match great people with great companies, and great companies with each other.”

Gladstone Group’s founder and CEO, Dan Kreuter will be a featured presenter at The Wealth Engineering Institute’s Upcoming FusionPower Conference, to be held in Orlando, Fla., November 13-15.

To learn more about the event, you can visit: <https://events.thefei.com/>

With this announcement Gladstone Group 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 Gladstone Group

Gladstone Group Inc. is a leading advisory firm specializing in Mergers & Acquisitions, Strategic Consulting, Valuations, and Executive Search for the wealth and investment management industry. With a nationwide presence, we exclusively serve Financial Advisors, RIAs, Family Offices, Asset Managers, Broker-Dealers, Private Equity firms, and institutional providers across the United States. Our commitment to intense focused activity, measurable results, and informed, objective advice sets us apart in the financial services sector. Gladstone Group Inc. delivers tailored solutions to drive growth, optimize performance, and maximize value for our clients.

For more information, visit <https://gstoneinc.com> Contact us at <https://gstonellc.com/contact-us/> .

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](https://www.mywehub.com) Nick@MyWEHub.com 407.878.3520

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