

# IRS Solutions Joins The Wealth Engineering Expert Sourcing Consortium

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ORLANDO, FL, UNITED STATES, December 4, 2024 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of IRS Solutions (IRSS) as an exclusive core component of its Expert Sourcing Consortium; synchronizing with our other expert sourcing firms and our elastic infrastructures – FusionPowered Wealth Advisory and OpenOption Practice Engineering Dashboards.

“We are excited to include the comprehensive IRS transcript reporting platform coupled with the tax resolution and planning software offered by IRS Solutions” said WE Founder and CEO Nick Gregory, ChWE. “The IRSS team’s expertise and proven approach assists Wealth Advisors, CPAs and other professionals in providing their clients’ with powerful tax planning solutions. IRSS 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. IRSS 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.”

“We appreciate the warm welcome into The Wealth Engineering Expert Sourcing Consortium and opportunity to channel our expertise toward their impressive network of wealth management firms”

*David Stone*



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The WE Fusion Powered Wealth Advisory model transforms firms from “AUM/Product Providers” to “Holistic Fee-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 opportunity to channel our expertise toward their impressive network of wealth management firms,” said David Stone, CEO of IRS Solutions. “Our commitment is to support Wealth Advisors, CPAs and other professionals with dynamic tax planning solutions software to allow planners insight to their clients IRS accounts. Coupled with the Wealth Engineering Platform, our turnkey dashboard allows professionals to gain access to our members-only growth solutions. The IRS Solutions’ blog is filled with valuable tax pro solutions and the latest IRS tax news, insights and other information,” said David Stone.

IRS Solutions’ CEO, David Stone, will be a featured presenter at The Wealth Engineering Institute’s upcoming Wealth Advisory FusionPower Conference. Live in Orlando - February 10-12. Learn more about the event: [weconferences.com](http://weconferences.com)

With this announcement IRS Solutions 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 IRS Solutions

IRS Solutions is a premier provider of tax resolution software tailored for tax professionals, including CPAs, enrolled agents, and tax resolution specialists. Founded to meet the unique challenges of IRS-related issues, the company offers a user-friendly platform that streamlines case management and automates processes. Key features include the IRS Advance Notice™ (IAN), which monitors client transcripts 24/7 and alerts professionals to potential audits and account changes, allowing for proactive client management. Additionally, IRS Solutions provides marketing resources, customizable branding tools, and ongoing education through free members-only training sessions. Learn more at: [IRSSolutions.com](http://IRSSolutions.com) David@IRSSolutions.com 844-447-7765

#### About The Wealth Engineering Family of Companies

Born 28+ 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 designations – Chartered Wealth Engineer (ChWE) and Chartered Family Office Advisor (ChFOA).

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