

Management Services International Joins The Wealth Engineering Expert Sourcing Consortium

The WE Family of Companies is pleased to announce Management Services International as an exclusive core component of its Expert Sourcing Consortium



LAKE MARY, FL, UNITED STATES,

December 17, 2024 /EINPresswire.com/ -- Management Services International Joins The Wealth Engineering Expert Sourcing Consortium

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Jeremy Colombik

Management Services International (MSI) 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 management services of Captive Insurance Plans offered by MSI” said WE Founder and CEO Nick Gregory, ChWE. “The MSI team’s expertise and proven approach will help

wealth advisors, CPAs and risk managers provide the much needed risk management solutions for their business owner clients as well as professionals and celebrities. MSI enables businesses and asset owners to cover, and manage, their own risks.” said Nick.

MSI 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. MSI 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.”

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 channeling our expertise toward their impressive universe of wealth management firms,” said Jeremy Colombik, CPA and Managing Partner of MSI. “We are dedicated to supporting wealth advisory firms and their clients. “We are focused on lowering total cost of risk; not just finding cheaper insurance. A “captive” can be a great solution for business owners; providing better risk management while sharing in the underwriting profits and qualifying for the ancillary tax benefits. A “captive insurer” is generally defined as an insurance company that is wholly-owned, and controlled, by its insureds. Its primary purpose is to insure the risks of its owners, and its insured’s benefit from the captive insurer’s underwriting profits,” said Jeremy.

MSI’s Managing Partner, Jeremy Colombik will be a featured presenter at The Wealth Engineering Institute’s upcoming Wealth Advisory FusionPower Conference, to be held in Orlando, Fla., February 10-12. To learn more about the event, you can visit: weconferences.com

With this announcement Management Services International 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 Management Services International

For more than 15 years, Management Services International (MSI) has provided alternative risk solutions, as well as formation and management services to a wide range of companies in various industries. We certainly understand that you face a lot of risk as a business owner, or risk management professional, and that there are exposures and risks that can't be covered with traditional insurance. Risks such as loss of key talent, business interruption, regulatory changes and regulatory investigations can all be covered with captive insurance. In fact, Congress formulated captive insurance to insure against risk. At MSI, it is our mission, and goal, to make Risk Management Profitable and our expert captive managers will manage and form captives onshore and in offshore domiciles. Learn more at: TheMSIcorp.com Jeremy@themsicorp.com

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 provide 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). Learn more at: MyWEhub.com nick@MyWEhub.com 407.878.3520

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