

PPC LOAN Joins The Wealth Engineering Expert Sourcing Consortium

The Wealth Engineering Family of Companies (WE) is pleased to announce its inclusion of PPCLoan as an exclusive core component of its Expert Sourcing Consortium

LAKE MARY, FL, UNITED STATES, February 18, 2025 /EINPresswire.com/ -- Lake Mary, FL, February 18, 2025 – The Wealth Engineering Family of Companies (WE) is pleased to announce its inclusion of PPCLoan, as an exclusive core component of its Expert Sourcing Consortium. “We are excited to include PPC LOAN’s robust funding platform of specialized loan products and services to RIAs & Independent Advisors,

Independent Insurance Agencies, and CPAs,.” said WE Founder and CEO, Nick Gregory, ChWE. “PPC Loan will serve the more than 2,170 wealth management, insurance and CPA firms that we consult with nationally. PPC Loan will help us continue to transform firms into a new wealth management dimension; magnifying their success by rejuvenating the contours of their practices to become more agile,” said Gregory.

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Dustin Mangone

“Building on our shared legacy of exceptional service to the financial services industry, PPC LOAN and WE are poised to unlock new opportunities through this partnership,” said Dustin Mangone, Managing Director of PPC LOAN. “This collaboration will empower Wealth Services Firms to access the capital they need to meet their short and long-term growth goals.” As the preferred capital provider for WE, PPC LOAN is offering tailored financing solutions for acquisitions, successions, working capital needs, and

business debt refinances/consolidations.



With this announcement, PPC Loan 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 PPC Loan

PPC LOAN is a leading provider of tailored conventional (non-SBA) financing solutions for investment advisory firms, independent insurance agencies, and CPAs. With over 25 years of experience in cash-flow based lending, PPC LOAN operates as a long-term source of capital and strategic partner supporting the capital needs for firm's inorganic growth plans and/or transitions to the next generation. Our expertise includes Growth Loans for Mergers and Acquisitions, NextGen Loans for partner Buy-Ins/Outs and Equity Purchases, and Refi Loans for business debt refinances and consolidations. PPC LOAN is committed to providing personalized service, industry-specific expertise, and flexible loan structures to help firms achieve their long-term financial and strategic goals. Learn more at ppcloan.com or contact us at 800.456.2779.

About The Wealth Engineering Family of Companies

Over the past 46+ years, the Wealth Engineering Family of Companies has developed a Wealth Advisory Concierge Dashboard. It provides high-touch total wealth advisory harmonized with high-touch wealth tech partner firms. WE provides a multi-disciplinary portfolio 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 wealth tech to create a synchronized hub for "client wealth building". WE helps advisors deploy new tactics in order to evolve from "AUM/Product Providers" to "Holistic Fee-Based Solutions Providers". WE helps rejuvenate the contours of advisory practices thru a vast array of proprietary modular solutions. WE is also the governing body and grantor of the professional designation - Chartered Wealth Engineer (ChWE). Learn more at: MyWEhub.com
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