

Trayecto Joins The Wealth Engineering Expert Sourcing Consortium

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

LAKE MARY, FL, UNITED STATES, May 7, 2025 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of Trayecto 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 equity compensation tax and planning services offered by Trayecto,” said WE Founder and CEO Nick Gregory, ChWE and ChFOA. “The Trayecto team’s expertise and proven approach will help wealth advisors and CPAs serve clients with equity compensation more efficiently and grow revenues by serving this demographic.” said Nick.

Trayecto’s services will be offered to our universe of 2,170+ TopTier wealth management firms and multi-family offices, as well as CPA and broker-dealer firms that my organization consults with. Trayecto 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 Blind Spots”.

“We are excited to participate in The Wealth Engineering Expert Sourcing Consortium and for the opportunity to apply our expertise to their exceptional network of wealth management firms,”



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Nick Gregory, CEO of The Wealth Engineering Family of Companies

said Russell Kroeger, CFP®, Co-Founder and CEO of Trayecto. "Our commitment is to support wealth advisory firms, tax professionals, and their clients by helping them make more informed decisions with equity compensation. There are about 30,000,000 Americans who receive equity as part of their comp package and it's a growing niche for financial and tax advisors. With Trayecto these professionals can improve their service offering, streamline workflows and analysis, deliver differentiated value, and grow their businesses." said Russell.

With this announcement Trayecto 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 Trayecto

Trayecto offers software and education for financial advisors and tax professionals who serve modern wealth accumulators—particularly clients navigating the complexities of equity compensation. Our vision is simple: make personalized, real-time financial advice accessible, no matter the complexity. Trayecto was founded on a key insight: the financial planning industry wasn't built for today's workforce. Traditional tools catered to linear careers, predictable salaries, and asset-rich retirees—not the modern professional balancing equity awards, multiple income streams, and entrepreneurial paths. We saw an opportunity to close that gap. With Trayecto, advisors and tax professionals can simulate key financial decisions and understand their impact on wealth creation, taxes, and financial independence—helping the modern professionals they serve make smarter decisions and build lasting wealth. Learn more at: trayecto.io

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](https://www.mywehub.com)

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