

Advisor Financing Joins The Wealth Engineering Expert Sourcing Consortium

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LAKE MARY, FL, UNITED STATES, May 7, 2025 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce its inclusion of Advisor Financing (AF), as an exclusive core component of its Expert Sourcing Consortium. "We are excited to include AF's robust funding platform of specialized loan products and services for RIAs and Independent Advisors, Independent Insurance Agencies, and

CPAs," said WE Founder and CEO, Nick Gregory, ChWE. "AF will serve the more than 2,170 wealth management, insurance and CPA firms that we consult with nationally. AF 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.

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".

"Building on our shared legacy of exceptional service to the financial services industry, AF and WE are poised to unlock new opportunities through this partnership," said Greg Prokott a Managing Director of Advisor Financing. "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, AF is offering tailored financing solutions for acquisitions, successions, working capital needs, and business debt refinances/consolidations.

With this announcement Advisor Financing 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





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Nick Gregory, CEO of The Wealth Engineering Family of Companies

knowledge, experience, services, products and technology with sound engineering principles to create a synchronized hub for family and business wealth building.

About Advisor Financing

Advisor Financing provides capital to financial advisors, built by financial advisors. We are the low cost provider of capital to advisors who are engaging in practice acquisitions, internal transitions and refinancing of that debt. In partnership with leading banking institutions, we deliver the most competitive rates, terms, and flexibility to meet the capital needs of advisors. We tailor our approach to each unique situation, determining the best financing solution and securing the most favorable terms.

Learn more at: advisorfinancingllc.com

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).

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