

# Zocks Joins The Wealth Engineering Expert Sourcing Consortium

ORLANDO, FL, UNITED STATES, May 14, 2025 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of Zocks 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.



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.”

“

The WE Fusion Powered Wealth Advisory model transforms firms from “AUM/Product Providers” to “Holistic Fee-Based/AUM Solutions Providers,”

*Nick Gregory, ChWE*

“We are excited to include the AI-powered client intelligence and workflow automation platform offered by Zocks,” said WE Founder and CEO Nick Gregory, ChWE and ChFOA. “The Zocks team’s expertise in securely capturing and analyzing client conversations is transforming how financial advisors and professionals better understand client needs, deliver more personalized service, and strengthen relationships.”

“We are grateful for the warm welcome into The Wealth

Engineering Expert Sourcing Consortium and for the opportunity to apply our expertise and suite of capabilities to their exceptional network of wealth management firms,” said Mark Gilbert, CEO and Co-Founder of Zocks. “Advisors are saving hours every day while using our platform, and we’re excited to empower Wealth Engineering advisors with the ability to work more closely with their clients and ultimately build on those vital relationships that make their practice successful.”

Zocks 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 our organization consults with. Zocks 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.” Said WE Founder and CEO Nick Gregory, ChWE and ChFOA.

With this announcement Zocks 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 Zocks

Founded in 2022, Zocks is an intelligent communications platform that automatically captures critical information from conversations. Zocks helps firms save time, get better data, and accelerate workflows. Zocks is backed by a host of investors including Lightspeed, Global Founders Capital and Ascend. Learn more about Zocks and try it out at [zocks.io](https://zocks.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://MyWEhub.com)

Brittany Sibal

The Wealth Engineering Family of Companies

[britt@mywehub.com](mailto:britt@mywehub.com)

---

This press release can be viewed online at: <https://www.einpresswire.com/article/812606877>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors

try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2025 Newsmatics Inc. All Right Reserved.