

Cyberfin Joins The Wealth Engineering Expert Sourcing Consortium

ORLANDO, FL, UNITED STATES, May 16, 2025 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of Cyberfin 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 cyber security management services offered by Cyberfin said WE Founder and CEO Nick Gregory, ChWE and ChFOA. “The Cyberfin team’s expertise and proven approach will help wealth advisors, CPAs and insurance professionals provide the comprehensive cyber security solutions for themselves and their clients.” said Nick.

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

Nick Gregory, ChWE

Cyberfin 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. Cyberfin 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 grateful for the warm welcome into The Wealth Engineering Expert Sourcing Consortium

and for the opportunity to apply our expertise to their exceptional network of wealth management firms,” said Daniel Metcalf, Co-Founder and CEO of Cyberfin. “Our commitment is to support wealth advisory firms and their clients by helping them understand and mitigate cyber risks with affordable, proven solutions. Clients want assurance that their information is valued and protected. Through our risk assessment process and strategic partnerships with industry leaders, we bring hands on experience with enterprise-grade solutions to small businesses to help mitigate those risks.” said Daniel.

With this announcement Cyberfin 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 CyberFin

Based in Minneapolis, CyberFin is a cybersecurity firm built specifically to support financial advisors, RIAs, insurance brokerages and their clients. Since 2019, we've been delivering comprehensive, fully managed cyber security solutions tailored to the unique challenges of the financial services industry. Our services include real-time threat monitoring, email and endpoint protection, regulatory compliance tools, and employee cyber security training — all designed to safeguard sensitive client data and keep your firm protected from evolving cyber threats. With a proactive approach and zero-cost breach remediation, CyberFin makes enterprise-level cybersecurity simple, scalable, and cost-effective for firms of all sizes. We help financial professionals stay secure, compliant, and focused on what matters most — their clients. Learn More At: cyberfin.net

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).

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