

# BOK Financial Advisor Trust Services Joins The Wealth Engineering Expert Sourcing Consortium

*The Wealth Engineering Family of Companies is pleased to announce BOK Financial Advisor Trust Services as a core component of its Expert Sourcing Consortium*

LAKE MARY, FL, UNITED STATES, July 3, 2025 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of BOK Financial Advisor Trust Services (BOKF ATS) as a 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 trust administration services offered by BOK Financial Advisor Trust Services said WE Founder and CEO Nick Gregory, ChWE. “The BOKF ATS team provides wealth advisers an entrepreneurial approach, innovative ideas, and much-needed fiduciary expertise in serving as a corporate trustee for the clients of advisors. BOK Financial ATS trust administration services will be offered to our universe of 2,150+ TopTier wealth management firms and multi-family offices, as well as CPA and broker-dealer firms that my organization consults with. This addition to our platform, 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 Blindspots”.

“We appreciate the warm welcome into The Wealth Engineering Expert Sourcing Consortium and the opportunity to offer our Trust administrative services to their universe of wealth



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*Rosemary Hueser, SVP of BOK  
Financial Advisor Trust  
Services*

management firms," said Rosemary Hueser, SVP of BOK Financial Advisor Trust Services. "We are dedicated to helping wealth advisory firms grow their business with creativity and confidence while doing what's right for their trust clients. Our commitment to delivering collaborative and comprehensive solutions in cooperation with wealth advisers is unmatched.

With this announcement BOK Financial Advisor Trust Services 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 BOK Advisor Trust Services

BOK Financial Advisor Trust Services provides advisor-friendly trust solutions, allowing financial advisors to deliver comprehensive investment management with the flexibility of holding client trust assets with the preferred custodian. Our Advisor Trust Services are offered through our national bank affiliate, BOKF, NA, which is federally chartered and able to work nationwide. © BOK Financial. Services provided by BOKF, NA. Member FDIC. Learn more at:

[bokfinancial.com/landing-pages/advisor\\_trust/advisor-trust-services](http://bokfinancial.com/landing-pages/advisor_trust/advisor-trust-services)

#### 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 provides 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](http://MyWEhub.com)

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