

Smartria Joins The Wealth Engineering Expert Sourcing Consortium

Lake Mary FL, July 23, 2025 – The Wealth Engineering Family of Companies is pleased to announce Smartria as a core component of its Expert Sourcing Consortium

LAKE MARY, FL, UNITED STATES, July 23, 2025 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of Smartria 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 suite of compliance services and software offered by Smartria. said WE Founder and CEO Nick Gregory, ChWE. "The Smartria team provides wealth advisers with best-in-class solutions for compliance program management, marketing reviews,

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Patrick Hunt, CEO of Smartria

employee and client trade monitoring, vendor management, and more." The Smartria compliance suite will be offered to our universe of 2,150+ TopTier wealth management firms as well as broker-dealer firms that my organization consults with. This addition to our Wealth Engineering HUB, 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 compliance administration solutions to their universe of wealth management firms,” said Patrick Hunt, CEO of Smartria. Our team is ready to provide white glove services.”

With this announcement Smartria 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 Smartria

Smartria® is a leading compliance management platform built specifically for investment advisors, broker-dealers, and other financial firms. The company’s software enables streamlined compliance workflows, simplified oversight, and real-time insight across entire compliance programs. Headquartered in Knoxville, Tennessee, Smartria serves firms across the United States with a mission to make sophisticated compliance simple and scalable, Learn more: Smartria.com

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

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