

# Holistico Joins The Wealth Engineering Expert Sourcing Consortium

*The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of Holistico as a core component of its Expert Sourcing Consortium.*

LAKE MARY, FL, UNITED STATES, August 21, 2025 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of Holistico 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 wealth advisory AI solutions offered by Holistico” said WE Founder and CEO Nick Gregory, ChWE. “The Holistico team provides wealth advisers with best-in-class full advisory life cycle co-pilot and more.” The Holistico’s digital platform will be offered to our universe of 2,150+ TopTier wealth management firms as well as broker-dealers 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.”

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*Nick Gregory, CEO of The Wealth Engineering Family of Companies*

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’re honored to join the WE Expert Sourcing Consortium,” said Eugene Yashin, CFA®, CEO and Co-founder of Holistico. “This partnership allows us to bring our AI-powered platform to a broad network of forward-thinking firms and help them unlock smarter, more scalable ways to deliver value to clients,”

With this announcement Holistico 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 Holistico

Holistico is an AI-powered advisor toolkit designed to help financial professionals grow AUM, deliver personalized strategies, and build client trust. Combining academic research, empirical investment expertise, and advanced AI, Holistico supports the full investment cycle — from portfolio analysis and proposal generation to risk assessment and compliance management. Built by advisors for advisors, Holistico empowers firms to streamline operations while staying focused on what matters most - Results. Learn more at: [holisticoinvest.com](https://holisticoinvest.com)  
[youtube.com/@HolisticoInvestment](https://youtube.com/@HolisticoInvestment)

#### 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](https://MyWEhub.com)

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