

CSG Partners Joins The Wealth Engineering Expert Sourcing Consortium

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

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-- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of CSG Partners as a core component of its Expert Sourcing Consortium. CSG joins other leading financial services practices that provide a comprehensive toolkit of M&A, client management, and practice management solutions to WE's network of RIA, CPA, legal, and diversified wealth advisory firms representing over 11,400 specialists nationwide.



"We are excited to include the employee stock ownership plan (ESOP) investment banking services offered by CSG Partners," said WE Founder and CEO Nick Gregory, ChWE. "The CSG team provides trusted business advisors, wealth professionals, and their clients with best-in-class insights, analysis, and end-to-end transaction advisory to build ESOP-led exit, succession, and liquidity strategies."

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Nick Gregory, CEO of The Wealth Engineering Family of Companies

"CSG's educational resources, thought leadership, and ESOP consulting capabilities will be offered to our subscriber base of over 2,170 top-tier firms. This addition to our Wealth Engineering HUB will further enhance our efforts in transforming firms into true total wealth management providers, 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”.

“CSG works closely with the wealth advisory community to build tax-efficient M&A alternatives and comprehensive business succession strategies for their clients nationwide,” said Andrew Nikolai, Managing Director at CSG Partners. “The Wealth Engineering Expert Sourcing Consortium is committed to providing top-tier advisors with the tools and training to leverage ESOPs solutions and help expand employee ownership throughout the middle-market. CSG appreciates the warm welcome to WE, and we’re looking forward to working with their growing universe of wealth management firms.”

With this announcement, CSG Partners 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 CSG Partners

CSG Partners has helped hundreds of closely-held companies structure, finance, and close ESOP transactions. Recognized for its rigorous analytics and pioneering capital markets capabilities, CSG has garnered over 40 Firm and Deal of the Year honors in the past decade alone. Beyond plan formations, the ESOP investment bank guides employee-owned companies through secondary sales, plan maintenance, buybacks, and M&A processes. Led by former accountants, bankers, attorneys, and entrepreneurs, CSG's unique perspectives and disciplined process drive desired outcomes for middle-market businesses. Since 2000, leading advisors have trusted CSG with ESOP solutions for both their clients and their own firms. Learn more at: csgpartners.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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