

BeyondWill Joins The Wealth Engineering Expert Sourcing Consortium

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

LAKE MARY, FL, UNITED STATES, September 18, 2025 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of BeyondWill 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 proactive, client-centric estate planning solutions offered by BeyondWill, said WE Founder and CEO Nick Gregory, ChWE. "The BeyondWill team provides wealth advisers with best-in-class solutions to simplify planning, keep documents aligned with life's changes, and strengthen client relationships."

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BeyondWill 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 modern, human-first estate planning solutions to their universe of wealth management firms,” said Justin Deja, CEO of BeyondWill. “Our mission is to help advisors stay connected, clients stay protected, and legacies preserved across generations.”

With this announcement BeyondWill 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 BeyondWill

BeyondWill is a modern, human-first estate planning platform designed for how advisors work and how families live. By blending legal essentials with proactive technology, BeyondWill makes planning more intuitive, collaborative, and ongoing. The platform helps financial advisors and their clients keep estate plans current with AI-powered updates, attorney-reviewed documents, and secure family collaboration. The result is stronger relationships, deeper trust, and legacies that reflect both wealth and values. Learn more at: BeyondWill.co

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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