AdvizorStack Joins The Wealth Engineering Expert Sourcing Consortium

LAKE MARY, FL, UNITED STATES, September 30, 2025 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of AdvizorStack 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 robust independence, technology, and fractional consulting expertise that AdvizorStack delivers to empower and scale wealth advisory firms within our partnership ecosystem.” said WE Founder and CEO Nick Gregory, ChFOA. AdvizorStack 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 fully integrated turnkey technology stack and our consultative experience to navigate the ever-changing landscape of the RIA community to the Wealth Engineering universe of wealth management firms,” said Paul DeMaio, CEO of AdvizorStack. “Our deep expertise in navigating and growing firms in the independent advisory space, combined with our role as behind-the-scenes partners, allows us to align technology and growth strategies so firms can focus on clients while we help power their operations.”

> We are excited to include the robust independence, technology and fractional consulting expertise that AdvizorStack delivers to empower and scale wealth advisory firms within our partnership ecosystem"
>
> *Nick Gregory, CEO of The Wealth Engineering Family of Companies*

"The AdvizorStack team provides over 50 years of combined experience in assisting advisors and their firms to navigate the dynamics of the RIA and IBD industry. Whether that means helping build a new RIA from scratch, joining a larger RIA, or powering a super-OSJ with comprehensive Back and Middle office support, AdvizorStack delivers the ecosystem and education to support advisors and firms of all facets to grow and find their future home." said Nico DeMaio, President of AdvizorStack.

With this announcement AdvizorStack 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 AdvizorStack
Built by advisors, for advisors, AdvizorStack equips wealth management firms with the tools, expertise, and infrastructure to succeed in independence. From helping secure "registrations" to selecting the right technology stack, implementing compliance frameworks, and providing fractional operational services, we ensure every step of the journey is supported. Acting as an Outsourced CTO and CGO, we help firms launch smoothly, scale effectively, and grow profitably transforming advisors into true enterprise leaders." Learn more at: AdvizorStack.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

Nicholas I. Gregory

The Wealth Engineering Family of Companies
+1 407-878-3520
email us here
Visit us on social media:
LinkedIn
