

Tamarix Joins The Wealth Engineering Expert Sourcing Consortium

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

ORLANDO, FL, UNITED STATES, February 24, 2026 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of Tamarix 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 Tamarix Platform as part of our partnership ecosystem, giving wealth managers, CPAs, and broker-dealers an efficient way to organize, monitor, and report on the private investments of their clients” said WE Founder and CEO Nick Gregory, ChFOA.

“The Tamarix team provides technology that automates data collection from private investments and turns it into clear, timely portfolio views — helping advisory firms and broker-dealers reduce manual work and improve oversight without disrupting existing workflows.

Tamarix 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 are excited to include the Tamarix Platform as part of our partnership ecosystem, giving wealth managers, CPAs, and broker-dealers an efficient way to organize, monitor, and report”

Nick Gregory, CEO of The Wealth Engineering Family of Companies

“We appreciate the warm welcome into The Wealth Engineering Expert Sourcing Consortium and the opportunity to offer an AI-first operating platform that simplifies how firms handle private investment data, reporting, and ongoing monitoring,” said Andrea Carnelli Dompé, CEO of Tamarix. “By automating document ingestion and portfolio monitoring, Tamarix helps firms spend less time on spreadsheets and more time delivering informed advice to their clients.” States Andrea.

With this announcement Tamarix 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 Tamarix

Tamarix is an AI-enabled operating platform that helps advisory firms, family offices, and other private markets investors monitor private investments more efficiently. The platform automatically collects documents from GPs, extracts and organizes data into a single source of truth, and delivers timely portfolio views, monitoring, and reporting by reducing manual data entry, spreadsheet work, and fragmented reporting, Tamarix helps firms improve oversight of private investments, streamline operations, and support better client and investment decisions at scale. Learn more at: tamarix.tech

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 L. Gregory
The Wealth Engineering Family of Companies
+1 407-878-3520

[email us here](#)

Visit us on social media:

[LinkedIn](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/894959789>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2026 Newsmatics Inc. All Right Reserved.