

Sofistic.AI Joins The Wealth Engineering Expert Sourcing Consortium

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

ORLANDO, FL, UNITED STATES, March 17, 2026 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of [Sofistic.AI](#) 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 Sofistic.AI Platform as part of our partnership ecosystem, giving wealth managers, both multi and single family offices, 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.

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We appreciate the warm welcome into The Wealth Engineering Expert Sourcing Consortium and the opportunity to work alongside RIAs who are serious about the future of advice.”

Denis Gauthier, CEO of Sofistic.AI

“The Sofistic.AI 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. Sofistic.AI 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 work alongside RIAs who are serious about the future of advice. Sofistic.AI gives advisors a 360-degree view of client wealth — including private investments and held-away assets — with AI-powered insights and simulation tools to deliver advice that's faster, more informed, and more proactive.” said Denis Gauthier, CEO of Sofistic.AI.

With this announcement Sofistic.AI 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 Sofistic.AI

Based in Montreal, Sofistic.AI delivers an AI-enabled wealth management platform for institutions looking to equip their wealth management teams and their clients. Its mission is to help advisors drive clients’ financial success through a modern digital experience, a comprehensive view, and AI-powered tools designed to simplify complexity. Learn More:

[sofistic.ai/](https://www.sofistic.ai/)

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://www.MyWEhub.com)

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