

FamVault Joins The Wealth Engineering Expert Sourcing Consortium

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

ORLANDO, FL, UNITED STATES, April 2, 2026 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of FamVault 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 FamVault Platform as part of our partnership ecosystem, giving wealth managers, CPAs, and broker-dealers an efficient way to provide a secure, accessible, and simple solution for managing essential documents 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 offer an innovative solution that helps advisors better support their clients”

Jeff Shavitz, CEO and Co-Founder of FamVault

“The FamVault team provides a secure, intelligent platform that helps individuals, families, and their advisors organize, protect, and seamlessly access critical legal, financial, and personal documents during life’s most important moments, including everyday needs, emergencies, incapacity, and the transition of wealth after death.

FamVault 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 an innovative solution that helps advisors better support their clients during life’s most important moments” said Jeff Shavitz, CEO and Co-Founder of FamVault. “By organizing and securely delivering critical information when it is needed most, we help create smoother transitions for families while strengthening the advisor-client relationship”.

With this announcement FamVault 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 FamVault

FamVault is a secure digital platform designed for RIAs and advisors supporting clients across all stages of life. More than just a static solution, FamVault ensures that critical documents such as wills, trusts, estate plans, insurance policies, and financial records are delivered to the right people at the right time during everyday use, major life events, incapacity, and after death. FamVault helps accelerate the estate settlement process, reducing delays and administrative burden for both clients and their advisors. Built for today’s evolving client needs, FamVault enhances organization, improves communication, and ensures continuity through life’s most important transitions. Advisors can collaborate with clients through an intuitive platform with tiered permissions, maintaining control over privacy while assisting with document management and preparedness. With advanced security protocols and real-time access controls, FamVault protects sensitive information while enabling secure, timely delivery to authorized individuals such as executors, beneficiaries, and medical professionals. FamVault is a powerful solution for streamlining workflows, strengthening client relationships, and helping advisors deliver greater value with confidence and care.

Plan with Purpose, Transition with Confidence! Learn More: famvault.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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