

Allposit Joins The Wealth Engineering Expert Sourcing Consortium

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

ORLANDO, FL, UNITED STATES, April 28, 2026 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of Allposit 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 Allposit 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.

“

We appreciate the warm welcome into The Wealth Engineering Expert Sourcing Consortium and the opportunity to work alongside RIA, CPA, MFO and SFOs that are serious about the future of advice”

Michael Liberman, CEO of Allposit

“The Allposit team provides HNW and UHNW clients and their advisory teams with a comprehensive digital balance sheet. The Allposit product aggregates, normalizes, and enriches disparate data from various sources to create a dynamic, flexible, and user-friendly interface directed toward the end user or wealth holder. And it’s all delivered at an extremely competitive price.”

Allposit 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.” Agentic consolidated performance reporting

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 RIA, CPA, MFO and SFOs that are serious about the future of advice. Allposit was built to fulfill a need that I was experiencing personally, designed to find the middle between the usability of a personal finance app and the sophistication of a family office software. It has been extremely rewarding to continue evolving the product to service family offices, multi-family offices, and RIAs with a flexible, cost-effective solution that allows them to focus on value-added services instead of data aggregation.” said Michael Liberman, CEO of Allposit

With this announcement Allposit 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 Allposit

Allposit was founded by leaders with over 40 years of combined experience in advanced trading and portfolio management technology and analytics. Originally purpose-built to service the needs of high-net-worth individuals with complex balance sheets, the product has evolved to provide family offices, multi-family offices, and RIAs with a flexible, cost-effective solution that allows them to focus on value-added services instead of data aggregation. Allposit are backed by a group of financial services and technology investors and practitioners, and is positioned to transform how wealth ownership data is recorded and shared. Learn More: allposit.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 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/908514422>

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.