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STP's ComplianceAdvisor Joins The Wealth Engineering Expert Sourcing Consortium

The Wealth Engineering Family of Companies (WE) today announced that STP's ComplianceAdvisor Platform has joined its Expert Sourcing Consortium

LAKE MARY, FL, UNITED STATES, July 7, 2026 /EINPresswire.com/ -- Partnership provides wealth advisors with direct access to institutional-grade compliance solution.

Lake Mary FL, July 7, 2026 – The Wealth Engineering Family of Companies (WE) today announced that STP's ComplianceAdvisor Platform has joined its Expert Sourcing Consortium, complementing WE's synchronizing with our other expert sourcing firms and our elastic infrastructures – FusionPowered Wealth Advisory and OpenOption Practice Engineering Dashboards. The partnership gives wealth advisors in WE's universe direct access to a full-service compliance suite covering program management, marketing reviews, employee and client trade monitoring, vendor oversight, and regulatory reporting, services that have become increasingly complex and expensive for firms to manage in-house..

"Compliance is no longer a back-office function. It's a growth enabler or a growth ceiling, depending on how it's built," said Nick Gregory, ChWE, Founder and CEO of Wealth Engineering. "Adding STP's ComplianceAdvisor to our Expert Sourcing Consortium gives the 2,170+ TopTier wealth management firms in our network a turnkey path to institutional-grade compliance, so their advisors can spend more time deepening client relationships and less time managing risk infrastructure."

This addition strengthens WE's Hub model, which helps advisory firms evolve from AUM and product providers into holistic, fee-based solutions providers, closing what WE calls "HNW client offering blindspots" while streamlining the technology stack behind the practice.

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> *Rachel Pham, SVP and Head of Go-to-Market at STP Investment Services*

front of exactly the firms we're built to serve, growth-minded RIAs that need scalable compliance without the overhead of a full in-house team," said Rachel Pham, SVP and Head of Go-to-Market at STP Investment Services. "Our team is ready to help WE's network firms reduce regulatory risk, pass audits with confidence, and free up internal capacity to focus on what actually drives revenue: serving clients while winning new ones."

With this addition, ComplianceAdvisor joins WE's growing arsenal of expert sourcing firms delivering specialized services, products, and technology to wealth management firms nationwide, a synchronized hub built on engineering principles for family and business wealth building.

About ComplianceAdvisor, a division of STP Investment Services

ComplianceAdvisor is the regulatory compliance practice of STP Investment Services, a global provider of technology-enabled investment operations, fund administration, and compliance solutions. Led by former Chief Compliance Officers with 20+ years of experience, ComplianceAdvisor helps RIAs, wealth managers, and private fund advisers stay audit-ready and reduce regulatory risk. Services span regulatory filings, compliance program management, marketing reviews under the SEC Marketing Rule, trade and electronic communications monitoring, mock exams, and outsourced CCO support, delivered through tiered programs (Prime, Plus, and a comprehensive top tier) that scale with each firm. STP supports clients representing more than $500 billion in assets serviced. Learn more at www.stpis.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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