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New Book Names the 'Seismic Shift' Reshaping High-Net-Worth Wealth Advisory

Drawing on a landmark 1979 Stanford Research Institute survey and four decades of practice, wealth advisory pioneer Nick Gregory introduces "Wealth Engineering"

ORLANDO, FL, UNITED STATES, July 23, 2026 /EINPresswire.com/ -- Drawing on a landmark 1979 Stanford Research Institute survey and four decades of practice, wealth advisory pioneer Nick Gregory introduces "Wealth Engineering" and the FusionPowered Advisor™ models in The Seismic Shift Within High Net Worth Wealth Advisory.

> "The profession that made you successful yesterday is not the profession that will make you relevant tomorrow"
>
> *Nick Gregory, CEO of The Wealth Engineering Family of Companies*

The Wealth Engineering Institute, part of the Wealth Engineering Family of Companies, today announced the release of The Seismic Shift Within HNW Wealth Advisory, a new book by Nicholas L. Gregory, ChFOA, ChCCA, ChFBA, Founder and Chief Architect of the Wealth Engineering Discipline. The book argues that the advisory practices built to serve High-Net-Worth (HNW) families over the past half-century are no longer sufficient to meet what those families actually want—and lays out a step-by-step process for advisors to close that gap.

The book's central claim traces back to a 1979 Stanford Research Institute survey of more than 37,000 business owners and successful individuals, which found that HNW clients were frustrated by prepackaged products, sales-driven advice, and the burden of coordinating a fragmented team of disconnected specialists on their own. Gregory, who began building an alternative model in 1982, contends that nearly fifty years later, research from other sources shows the same gap persists between the services HNW clients receive, desire, and value most—particularly in tax planning, estate and legacy planning, business succession, and charitable planning and twelve other disciplines.

"The profession that made you successful yesterday is not the profession that will make you relevant tomorrow," Gregory writes in the book's foreword. The Book uses that premise to introduce Wealth Engineering: a discipline that applies engineering principles—diagnosis before prescription, designing to a client's actual constraints, building in redundancy, documentation, and ongoing monitoring—to the coordinated management of a client's total wealth ecosystem, spanning their business, family, tax, estate, risk, charitable planning and other key disciplines as a single interconnected system.

From Checkers to Chess

Organized in six parts across 29 chapters, the book walks readers through the full "Wealth Engineering Process"—from client discovery and diagnosing service gaps using the book's "GAPS Chart" methodology, to designing a coordinated planning "blueprint," sourcing outside expertise, implementation, and ongoing monitoring. It introduces the FusionPowered Advisor™ model, a framework for fusing engineered strategy, a network of vetted specialists, and professional case design into a single, coordinated client offering, and explores specialized domains including charitable capital planning, family business advisory, and multi-family office technology.

The WE Fusion Powered Wealth Advisory model transforms firms from "AUM/Product Providers" to "Holistic Fee-Based Solutions Providers," while streamlining technology and bridging "HNW Client Offering Blind Spots".

"Every advisor I coach eventually asks the same question: how do I stop competing on the same ground as everyone else?" notes one practice management consultant quoted in the book's early praise. "This book is the most complete answer to that question currently available."

Learn more at the Wealth Engineering Fall Conference: weconferences.com

About the Author

Nicholas L. Gregory, ChFOA, ChCCA, ChFBA, is the founder and chief architect of the Wealth Engineering discipline. Beginning in 1982, he began building on the findings of the 1979 Stanford Research Institute survey to construct an advisory discipline grounded in engineering principles rather than the prepackaged, sales-intensive model that survey identified as a central source of client frustration.

Over more than four decades, that work has grown into an institutional ecosystem serving top-tier wealth advisory and CPA firms nationwide, including a governing institute that grants professional designations in the discipline, a proprietary library of engineered strategy programs spanning eight major planning domains, a dedicated charitable capital planning center, a family business advisory community, and a multi-family office technology platform.

Gregory is CEO, Founder and Board Chairman of each company making up the Wealth Engineering Family of Companies: Family Business Hub; The Charitable Capital Design Center; Family Wealth Hub and The Wealth Engineering Institute. He holds a Bachelor of Science in Business Administration, with minors in Economics and Finance, from Ball State University and is

Chairman of The Charitable Capital Advisory Council and co-founder and Chairman of the Board of Trustees of Give Back Nation, a national community foundation. He continues to coach, train, and mentor TopTier advisors nationwide and speaks frequently at industry conferences.

Book Details
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Lean more at the Wealth Engineering Fall Conference: weconferences.com

About the Wealth Engineering Family of Companies
Born 44+ 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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