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The Wealth Engineering Institute Launches the Enhanced, Online Chartered Family Office Advisor™ Professional Designation

ORLANDO, FL, UNITED STATES, July 29, 2026 /EINPresswire.com/ -- The Wealth Engineering Institute Launches the Updated, Online Chartered Family Office Advisor™ (ChFOA™) Professional Designation for Advisors Serving UHNW Families - Bringing families, their advisors and all of their wealth together™.

Ten-class online curriculum equips wealth advisors, attorneys, accountants, and other financial professionals with the tools to design, manage, and coordinate every dimension of a family's total wealth – Mastering the UHNW wealth advisory maze at scale™.

> “UHNW families have long been frustrated by prepackaged products, fragmented advisor relationships, and unnecessary complexity”
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> *Nick Gregory, CEO of The Wealth Engineering Family of Companies*

The Wealth Engineering Institute, as part of The Wealth Engineering Family of Companies, today announced the launch of its updated online Chartered Family Office Advisor™ (ChFOA™) designation, a professional credential built for advisors who serve UHNW families and their increasingly complex wealth ecosystems.

With nationally renowned faculty, the ChFOA™ program delivers a ten-class online curriculum — approximately 44 contact hours — that guides advisors from family office structure and methodology through the technical disciplines of business entity design, employee compensation engineering, tax-qualified retirement design, charitable capital strategies, asset protection, deferred compensation, business succession, and estate preservation, culminating in a capstone class on family wealth psychology and governance.

"UHNW families have long been frustrated by prepackaged products, fragmented advisor relationships, and unnecessary complexity," Nick Gregory, CEO and Board Chairman of the

Institute said, pointing to a landmark 1979 Stanford Research Institute survey of more than 37,000 business owners that identified those very frustrations and continues to shape the program's design. The ChFOA™ curriculum is built on the Institute's Wealth Engineering Process, which fuses broad multi-disciplinary knowledge, strategic teaming with outside specialists, and custom-designed solutions — an approach the Institute refers to as the FusionPowered Advisor model. The model is designed to help advisors move from a product centric/AUM-driven practice to a holistic, fee-based family wealth solutions practice.

The Seismic Shift In Wealth Advisory
Obtaining the ChFOA™ designation can help transform professionals from product providers to holistic, fee-based solutions providers while streamlining technology and bridging UHNW client offering GAPS.

Program Highlights – Taught by a carefully selected, nationally recognized group of Faculty Members
• Ten sequenced online classes covering Family Office Architecture & Structure; The Wealth Engineering Process & The FusionPowered Advisor™; Business Entity Design & Engineering; Executive & Employee Compensation Design; Tax-Qualified & Retirement Plan Engineering; Charitable Capital & Planned Giving Strategies; Asset Protection & Risk Management; Deferred Compensation & Executive Benefit Strategies; Business Succession & Estate Preservation; and a capstone class on Family Wealth Psychology, Governance & Case Design.
• Practical tools and templates, including training manuals, client-facing brochures, presentation decks, application kits, and prototype legal documents drawn from the Institute's modular program library.
• Access to the Institute's Expert Sourcing Network of accounting, legal, banking, insurance, and investment specialists, along with regional chapters and peer networking opportunities.
• A rigorous Code of Ethics and Standards requiring designees to act with integrity, objectivity, and competence, and to disclose conflicts of interest.

Who May Quality to Enroll
The program is designed for multi-family office professionals, wealth management advisors, estate planning attorneys, CPA and accounting firm partners, financial planners, insurance and risk management professionals, family business consultants, private bank and trust officers, retirement plan specialists, and high-net-worth client service teams.

Eligibility and Designation Requirements
To earn and maintain the ChFOA™ designation, candidates must have a minimum of ten years of relevant professional experience, have obtained at lease one other relevant professional designations, complete the Institute's curriculum and pass a comprehensive examination, adhere to the governing Code of Ethics and Standards, complete 40 hours of continuing education every two years, and remain in good standing with any applicable self-regulatory organization.

Program Summary at: https://mywehub.com/wp-content/uploads/2026/07/ChFOA_Program_Summary.pdf
Learn more at the Fall Wealth Engineering Conference: WEconferences.com

About The Wealth Engineering Institute and the WE 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: www.MyWEhub.com
Review the Book: The Seismic Shift With HNW Wealth Advisory - https://mywehub.com/wp-content/uploads/2026/07/The_Seismic_Shift_Within_High_Net_Worth_Wealth_Advisory.pdf

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