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Greenboard Joins The Wealth Engineering Expert Sourcing Consortium

The Wealth Engineering Family of Companies (WE) today announced that Greenboard has joined its Expert Sourcing Consortium

ORLANDO, FL, UNITED STATES, August 20, 2026 /EINPresswire.com/ -- Partnership provides wealth advisors and their clients with a turnkey, AI-native, unified compliance platform

The Wealth Engineering Family of Companies (WE) today announced that Greenboard 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 network direct access to a full-service suite of compliance monitoring, recordkeeping, and regulatory workflow tools purpose-built for SEC- and FINRA-regulated firms.

> Joining the Wealth Engineering Expert Sourcing Consortium puts our AI-native platform in front of the exact firms we're built to serve"
>
> *Dave Feldman, co-founder and CEO of Greenboard*

"Blending the AI-native compliance platform of Greenboard with the compliance consulting services of STPCompliance into our Expert Sourcing Consortium creates a dynamic fit for the Wealth Advisory firms that my organization consults with" said Nick Gregory, ChWE, Founder and CEO of Wealth Engineering.

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

“Joining the Wealth Engineering Expert Sourcing Consortium puts our AI-native platform in front of the exact firms we’re built to serve—growth-minded RIAs that are looking to modernize their compliance stack without compromising reliability or human oversight,” said Dave Feldman, co-founder and CEO of Greenboard. “Our team is ready to help WE’s universe of wealth advisory firms unify compliance workflows, consolidate legacy tools, and stay exam-ready as they scale.”

With this addition, Greenboard 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 Greenboard
Greenboard is the AI-native system of action for SEC and FINRA compliance. Founded in 2023 by Dave Feldman and Ed Schembor, Greenboard replaces the fragmented tools financial institutions rely on for marketing review, communications supervision, employee compliance, and third-party oversight with one unified, AI-native platform. Greenboard Go, the platform's AI layer, delivers policy-grounded answers and automation across the compliance program, grounded in each firm's actual policies and procedures. More than 500 financial institutions run their compliance programs on Greenboard, with over 99% customer retention. To learn more, visit www.greenboard.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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