

Visory Joins The Wealth Engineering Expert Sourcing Consortium

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

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Partnership provides RIA and CPA firms
with dynamic managed IT services

The Wealth Engineering Family of Companies (WE) today announced that Visory 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 advisory and CPA firms in WE's network direct access to cybersecurity, managed IT, cloud hosting, compliance and technology advisory services designed for the unique needs of wealth management firms.



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*Nick Gregory, ChWE, Founder
and CEO of Wealth
Engineering*

“The Visory team brings deep experience helping firms strengthen security, modernize operations and build a more resilient technology foundation,” said Nick Gregory, ChWE, Founder and CEO of Wealth Engineering. “Adding the capabilities of Visory’s cyber security, managed IT, cloud services and compliance solutions to our Expert Sourcing Consortium gives the 2,170+ TopTier wealth management firms in our network access to a trusted technology partner that can help reduce risk, improve efficiency and support long-term growth.”

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.

"Joining the Wealth Engineering Expert Sourcing Consortium extends our reach to firms seeking practical technology and cybersecurity guidance in an increasingly complex environment," said Brett Helgeson, Visory chief executive officer. "Our team is ready to help WE's network of firms protect client data, support compliance objectives, improve operational performance and create a stronger foundation for future growth."

With this addition, Visory 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 Visory

Visory is a nationally recognized provider of managed IT, cybersecurity, cloud and hosting solutions, supporting more than 4,500 organizations across the United States. By combining deep industry expertise with disciplined execution, Visory delivers systems designed to protect critical data, strengthen business continuity and support long-term growth. The company's hands-on approach ensures clients have the stability and clarity needed to operate with confidence in an increasingly complex digital landscape. An Inc. 5000 company and multi-year recipient of the CRN MSP 500 and CRN Security 100 awards, Visory partners with independent financial advisors, accounting firms, construction companies and other growth-focused businesses to build secure, resilient technology environments.

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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