NDEX Joins The Wealth Engineering Expert Sourcing Consortium

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

ORLANDO, FL, UNITED STATES, September 3, 2026 /EINPresswire.com/ -- Partnership provides dedicated data tools for every financial professional

The Wealth Engineering Family of Companies (WE) today announced that NDEX Systems 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 NDEX's patented, all-in-one wealth management and investment accounting platform, enabling them to aggregate, normalize, and reconcile widely sourced financial data into a single, holistic "total wealth" view of their clients' holdings across every asset class, both on and off-book, all within a secure, SOC 2-certified environment their firm controls.

> The NDEX platform offers advisors and family offices a comprehensive all-in-one platform that provides a 'total wealth' picture"
>
> *Nick Gregory, Founder and CEO of Wealth Engineering*

"The NDEX platform offers advisors and family offices a comprehensive all-in-one platform that provides a 'total wealth' picture ," said Nick Gregory, Founder and CEO of Wealth Engineering. "Adding the capability of reporting on both on and off book assets" for our Expert Sourcing Consortium gives the 2,170+ TopTier wealth management firms in our network a decisive competitive edge - a consolidated, client-facing reporting experience that eliminates hours of manual data entry, deepens client relationships through true portfolio transparency, and equips our advisors to capture and advise on the full scope of a household's wealth rather than just publicly traded assets.”

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 blind spots" while streamlining the technology stack behind the practice. “Joining the Wealth Engineering Expert Sourcing Consortium puts our patented data and reporting technology directly into the hands of one of the fastest-growing networks of top tier advisory and family office firms in the country. “It is a natural fit with our mission to let firms truly own their financial data," said Laurent Bensemana, Founder and CEO of NDEX. "Our team is ready to help WE's network of firms consolidate their clients' complete financial picture, reclaim the time lost to manual reconciliation, and deliver the kind of transparent, value-added reporting that turns data into deeper client trust."

With this addition, NDEX 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 NDEX
Founded in 1999, NDEX Systems is a patented wealth management and investment accounting platform on a mission to democratize access to financial data and let firms own their own data. Trusted by leading family offices, portfolio management firms, independent advisors/RIAs, and accounting firms across North America, NDEX combines the industry's most trusted financial data with an all-in-one platform for portfolio management, trade management, performance reporting, client onboarding, branded client-facing portals, adaptive billing, and proactive compliance. Its patented data solutions normalize, reconcile, and bridge widely sourced financial data across all asset classes, on and off-book, into clean, actionable insights, giving advisors a consolidated "total wealth" view of every client. NDEX is SOC 2 certified and supports thousands of wealth managers and firms managing hundreds of billions of dollars in assets. Learn more at: NDEXsystems.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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