

InCap Group Joins The Wealth Engineering Expert Sourcing Consortium

The Wealth Engineering Family of Companies is pleased to announce the inclusion of InCap Group as an exclusive core component of its Expert Sourcing Consortium

LAKE MARY, FL, UNITED STATES, February 27, 2025 /EINPresswire.com/ -- The Wealth Engineering Family of Companies (WE) is pleased to announce the inclusion of InCap Group as an exclusive core component of its Expert Sourcing Consortium; synchronizing with our other expert sourcing firms and our elastic infrastructure – FusionPowered Wealth Advisory and OpenOption Practice Engineering Dashboards.



“We are excited to include InCap’s comprehensive M&A advisory and valuation services on an exclusive basis,” said WE Founder and CEO Nick Gregory, ChWE. “The InCap team’s expertise and proven approach assists investment management firms in making sound buy, sell or merge

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decisions to achieve viability and growth. InCap’s services will be offered to our universe of 2,150+ TopTier wealth management firms and multi-family offices, as well as CPA and broker-dealer firms that my organization consults with. InCap will further enhance our efforts in transforming firms into a true total wealth management dimension; modernizing their practice ecosystems at scale to deepen organic growth and enhance profitability and value.” said Nick.

The WE “organic growth’ consulting model transforms firms from “AUM/Product Providers” to “Holistic Fee-Based/AUM Solutions Providers,” while streamlining technology and bridging “HNW Client Offering Blind Spots”.

“We appreciate the warm welcome into The Wealth Engineering Expert Sourcing Consortium and contributing our expertise to their impressive network of wealth management firms,” said James Tennes, founder and CEO of InCap Group.” “We are dedicated to supporting advisory firms in buying, selling, merging or strategically growing their practice.”

InCap Group’s founder and President, James Tennes will be a featured presenter at The Wealth Engineering Institute’s upcoming FusionPower Conference, to be held in Orlando, Fla., June 18-20 10-12.

To learn more about the event, you can visit: <https://weconferences.com>

With this announcement InCap Group joins the Wealth Engineering arsenal of best-in-class expert sourcing firms that provide a vast array of services and products to Wealth Engineering’s network of wealth management firms across the nation. The result is the fusion of advanced knowledge, experience, services, products and technology with sound engineering principles to create a synchronized hub for family and business wealth building.

About InCap Group

InCap Group, Inc. is a premier boutique investment banking firm specializing in Mergers & Acquisitions, Strategic Consulting, and Valuations. InCap has been serving asset managers, wealth managers, and securities brokerage firms for over 30 years.

About The Wealth Engineering Family of Companies

Born 46+ 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 designation – Chartered Wealth Engineer (ChWE). Learn more at: MyWEhub.com nick@MyWEhub.com
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