



Eddy Augsten

Co-Founder WealthEngage

Eddy Augsten has a career in financial services spanning product development, intermediary distribution, asset management, and wealth management. Eddy spent most of his career at a Director level working for global asset managers. He has worked with major brokerage firms including Merrill Lynch, Morgan Stanley, and UBS to large independents and Registered Investment Advisors as an investment consultant. Most recently Eddy co-founded WealthEngage an independent wealth management firm focused on complex wealth solutions and custom portfolio management for high net worth families, executives, and business owners. WealthEngage uses technology, creativity, and alternative approaches to challenge the industries brokerage model. The firm is committed to engaging clients through purposeful planning. Eddy has also been involved in Start-ups, Venture Capital and Commercial Real Estate. Eddy has an undergraduate degree from FIU and a Global Masters in Finance from IE Business School, he is a Chartered Alternative Investment Analyst (CAIA), and a Certified Investment Management Analyst (CIMA) and has multiple securities licenses.