



Matt Schlueter

EVP, Operations & Technology Solutions

As Executive Vice President, Operations and Technology Solutions, at Osaic, one of the nation's largest providers of wealth management solutions, Matt is responsible for driving and delivering innovative solutions that help financial professionals create time and efficiency in their businesses. In his role, Matt has oversight of multiple functions in support of the firm's mission to empower entrepreneurial Advisors to fulfill their clients' dreams and build thriving businesses. These include advisor support, trading and securities, field supervision, business transformation, technology, operations analytics and enablement, licensing and registration, and operations processing. Having come from a family of entrepreneurs, he possesses a deep understanding of and passion for the noble work Advisors do each day—not only as business owners—but also in their service to millions of Americans.

Career Summary

Throughout Matt's nearly 30-year career with Osaic, he has held several leadership roles across the organization, touching nearly all functions and holding executive roles including Head of Ops, Tech, and Services; Chief Administrative Officer; President, Wealth Planning Solutions; and President, Products and Platforms. Before joining Osaic, he was with The Federal Reserve Bank.

Matt is an active member of the Fidelity Advisory Council, BNY/Pershing Wealth Advisory Board, and Broadridge Wealth Management Executive Exchange. He received his B.A. in Economics from Emory University and holds Series 7, 24, 63, 53, and 55 FINRA securities licenses.

Securities and investment advisory services are offered through the firms: Osaic Wealth, Inc. and Osaic Institutions, Inc., broker-dealers, registered investment advisers, and members of FINRA and SIPC. Securities are offered through Osaic Services, Inc. and Ladenburg Thalmann & Co., broker-dealers and members of FINRA and SIPC. Advisory services are offered through Ladenburg Thalmann Asset Management, Inc., and Osaic Advisory Services, LLC., registered investment advisers. Advisory programs offered by Osaic Wealth, Inc. are sponsored by VISION2020 Wealth Management Corp., an affiliated registered investment adviser.