Ed Swenson

EVP, RIA Solutions

As Executive Vice President, RIA Solutions at Osaic, one of the nation's largest providers of wealth management solutions, Ed oversees RIA and W-2 implementation and manages the firm's overall channel strategy, offerings, partnerships, delivery, and value realization for RIA clients. He ensures that RIA professionals have the support they need to manage their practices, including technology, capital, marketing, compliance, relationship management, transition assistance, M&A assistance, and investment platforms support.

Career Summary

With more than 25 years' experience, Ed is a leader known for championing entrepreneurs and the RIA space. He has authored numerous articles for publication and frequently speaks at industry events about his experience designing, leading, and executing strategic initiatives within the RIA space. Ed also serves on the board of the Invest in Others charitable organization.

Prior to joining Osaic in 2023, Ed was the co-founder, Chief Operating Officer and Member of the Board of Directors of Dynasty Financial Partners, a wealth technology and professional services firm. Prior to Dynasty, Ed served as a portfolio manager at Legg Mason and Head of Multiple Discipline Account Platforms at Citigroup.

Ed received his bachelor's degree from the London School of Economics and holds an MBA from the Stern School of Business at New York University.