

# Wealth Management Industry Veteran Edward Walters Joins Tolerisk Advisory Board to Help Drive Next-Gen Risk Management

MARLTON, NJ, UNITED STATES, April 2, 2025 /EINPresswire.com/ -- Tolerisk, a leader in fiduciary-caliber risk tolerance assessment technology for investment advisors, today announced the appointment of [Edward Walters](#), who was most recently the Chief Operating Officer and Head of Wealth Management at Osaic Financial Advisors & Financial Securities. In this role, he oversaw the strategic operations and integration of the wealth management division of Lincoln Financial Group, which Osaic Wealth recently acquired.

“Edward’s deep understanding of wealth management strategy, particularly his experience in scaling advisory businesses, is precisely what Tolerisk needs as we enter our next phase of growth,” said Tolerisk Founder & CEO Mark Friedenthal. “His insights will be invaluable as we continue to refine our tools to help advisors navigate the complexities of modern client portfolios. With Edward on the board, we’re integrating strategic vision that will directly impact our product evolution and market penetration.”

Walters joins [the esteemed group of industry leaders](#) with extensive experience in financial planning, insurance, fintech, business development, legal and compliance, and more:

- Frank Anguiano - Managing Partner, Alcanza Global
- Brian Edelman - CEO, FCI
- Jonathan Jacobs - SVP, LIBRA Insurance
- Miriam Lefkowitz - Compliance Attorney, principal of Miriam Lefkowitz, LLC and Coda Advisory Group LLC
- Michael Raneri - Chief Technology Officer, Voya Financial
- David Ritchey - DVP, Symetra
- Colin Slabach - Assistant Professor at NYU, Faculty Lead of MS in Financial Planning
- Kelly Waltrich - CEO, Intention.ly
- Michael Zebrowski - COO, Docupace

“I’m excited to contribute to the Tokerisk mission of providing advisors with the tools and insights they need to make informed risk management decisions in an increasingly complex and ever-evolving environment,” said Walters. “I see a significant opportunity to leverage my experience in driving strategic growth to further enhance Tolerisk’s position as a leader in risk assessment technology.”

This appointment follows a period of significant momentum for Tolerisk. Earlier this year, the company welcomed Ben Mavy as Chief Revenue Officer and Head of Sales, signaling a strategic focus on expanding its market presence. Additionally, Tolerisk has consistently invested in product enhancements, delivering key upgrades to Portfolio Scoring, seamless integrations with leading financial platforms, and a redesigned user interface.

These advancements support Tolerisk's dedication to empowering advisors with cutting-edge technology that supports practice growth and mitigates compliance risk. This commitment to innovation is reflected in Tolerisk's consistently high user satisfaction, evidenced by its 8.35 rating in the 2025 T3 Advisor Survey — well above the industry average for the fourth consecutive year.

To learn more, [visit our website](#).

Kelly Waltrich

Intention.ly on Behalf of Tolerisk

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