



Red Oak Announces Strategic Leadership Changes to Support Its Expanding Compliance Connectivity Platform

AUSTIN, TX, UNITED STATES, June 12, 2025 /EINPresswire.com/ -- Red Oak, the industry's only Compliance Connectivity Platform, today announced key leadership transitions to strengthen its executive team, accelerate growth and deepen engagement with financial services clients. Current board member, Denise Wypiszenski has been named Chief Revenue Officer, reporting to the CEO, and will lead go-to-market strategy and execution. Simultaneously, Anita Heisl assumes the role of Chief Client Officer, reporting to the CRO, focused on implementations, client success and ongoing support. Finally, Red Oak co-founder, Cathy Vasilev has been named Chief Engagement Officer, reporting to the CEO. These changes closely follow Red Oak's acquisition of 4U Platform which brought together best-in-class compliance technology and seamless content distribution to streamline regulatory workflows for investment firms and wealth management companies.

Elevating Proven Leadership

Wypiszenski joins Red Oak's leadership ranks as an accomplished fintech entrepreneur and former Co-CEO of 4U — the financial services industry's first real-time, digital content connectivity platform connecting investment firms and wealth managers. Her career began on Wall Street with Smith Barney and evolved through founding Orchid Network, an executive search and consulting firm serving the financial sector.

Similarly, Heisl brings decades of hands-on financial services experience, with twenty years leading the practice development and marketing teams at Ziegler, followed by a VP Branch Management role at Charles Schwab. Most recently, as Chief Engagement Officer at 4U, Anita used her deep understanding of the asset management and advisor ecosystem to empower 4U's clients for success.

"Red Oak has significantly expanded its leadership breadth and depth with our 4U acquisition" said Dave Dutch, CEO at Red Oak. "Tapping Denise and Anita to lead crucial client-facing roles was an easy decision. Both have cultivated trusted relationships across our industry, and both have proven themselves time and time again over their successful careers in financial services."

Meanwhile, Vasilev brings over two decades of operational and compliance expertise across the insurance and financial services industries and has been a driving force at Red Oak since its

inception in 2010.

“Cathy has always approached compliance as a strategic enabler, not a constraint, and she has been a passionate evangelist for Red Oak’s clients and the industry in general” said Romir Bosu, Red Oak executive chairman. “Formalizing her role as Red Oak’s leader of engagement is a win for Red Oak, its clients and the financial services overall.”

Together, Wypiszenski, Hiesl and Vasilev will be instrumental in furthering Red Oak’s vision: delivering AI-powered technology that simplifies regulatory complexity and enhances compliant connectivity among investment companies, wealth management firms, financial advisors and investors around the globe.

A Vision for Scalable Growth

The bolstering of the executive team comes at a time of sustained momentum for Red Oak, as firms across the investment and insurance landscape increasingly seek integrated scalable solutions to streamline compliance review processes, connect marketing operations and ensure ongoing compliant communications.

As Red Oak enters its next phase of growth, the company remains focused on empowering firms with its compliant, connected, and customizable AI-powered technology platform.

About Red Oak

Red Oak is the industry’s only Compliance Connectivity Platform, unifying best-in-class compliance technology, seamless content distribution and ongoing supervisory monitoring to streamline regulatory workflows for investment firms and wealth management companies globally. Serving over 2,300 firms worldwide, including almost all of the top 20 asset managers, Red Oak’s suite of 17(a)-4/WORM compliant solutions reduces inefficiencies, mitigates risk, and accelerates time-to-market for financial professionals. For more information, visit www.redoak.com or connect on [LinkedIn](#).

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