



Kristen Schmidt

As Founder of [RIA Oasis](#), Kristen uncovers the real-time hurdles advisors face when it comes to technology, integrations & workflow building. As a Technology Strategist & Speaker, Kristen works directly with advisors and planners to assess, research, & implement technology platforms. Her passion is uncovering business solutions by marrying tech with best practice initiatives.

[Kristen's career](#) spans over 15 years in financial services, specializing in operational efficiencies related to technology & business infrastructure. Kristen was the Operations Manager and COO of a now billion dollar+ RIA based in the Midwest where she spearheaded & implemented a proprietary tech platform while leading a full operations team in the process. As a prior member of the TD Ameritrade Institutional Operations Panel, Kristen has had the unique opportunity to uncover the ever-changing tech landscape by being boots on the ground with a variety of influencers. Kristen has spoken & presented around the US as an agnostic, strategic partner to tech vendors, RIA firms, Hybrid model firms, Financial Planning firms, Consultants & Custodians throughout the industry.

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