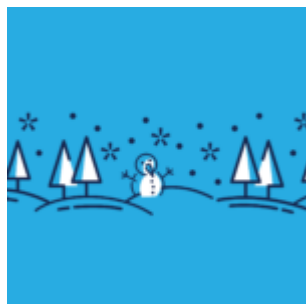


12 Things That Should be on Every RIA's Holiday Wish List



Tis' the season! This time of year means lots of different things to different people, but one thing is for certain: it gets busy! There are parties to attend, presents to buy, and of course, a business to wrap up at year-end. So in all of that hustle and bustle, it's easy to see how you may forget about that extra-special someone on your holiday gift list: your business!

But don't worry. We're helping you simplify this holiday season with Orion's holiday wish list!



The Latest from Santa's Workshop

Report Builder 3.0

Looking for something personal this holiday season? Report Builder 3.0 brings you all-out customization so that you can build client reports that are as festive as your clients using our drag-and-drop functionality, dynamic chart creation and more! [Click here](#) to see how you can start creating custom reports today.



No Holiday Magic Required

Digital Account Opening Tools with Schwab and TD Ameritrade

No, it's not magic, but it's close! You can now open accounts digitally in as little as 5 minutes with Schwab and TD Ameritrade's Digital Account Opening tools! Starting from the New Accounts Center app in Orion Connect, you can push relevant Orion data right into your custodial new account forms — giving yourself the gift of time this holiday season!

Don't worry, we're launching similar digital account opening tools in early 2019! Stay tuned for more information.



Ring-a-Ling, Hear Them Ring

Events Based Notifications

Just because the holidays must come to an end, doesn't mean the bells have to stop too. With Events Based Notifications (set to launch in early 2019), you'll be able to send clients notifications regarding RMD requirements, account transactions, and so much more!

But it's not just for your clients; you too can receive alerts regarding advisor approvals, trade notifications, third-party integrations, and more. Be on the lookout for more information coming soon!



Your Very Own “Elf on the Shelf”

Compass

Not everyone makes the “nice list”. With Orion’s Compass app, you’ll have access to a suite of capabilities necessary to implement and execute a robust compliance program. Powered by data that is already available within Orion, we’re making it easy for you this holiday season to make the most knowledgeable decisions and effectively execute your regulatory program. Check out our Compass whitepaper to learn more.



More Exciting Than Spiked Eggnog

Orion Enterprise

As exciting as the holidays can be, we’re even more amped up for one of our latest announcements, Orion Enterprise – a better full-service technology and

asset management platform solution! With Orion Enterprise, you'll have access to industry-leading strategists and turnkey asset management, powered by best-in-class portfolio management technology so that you can grow and scale while empowering your advisors to better serve their clients.

Want to learn more? Check out our press release or contact us to set up a demo and see how we can help accelerate your firm's growth!



There'll be Parties for Hosting, Marshmallows for Toasting and Businesses Set to Grow

Best-in-Class Portfolio Management Technology

Grow more than just your waistline this holiday season with Orion's industry-leading portfolio management software! We offer firms like yours a modern and innovative platform to streamline inefficiencies so you can spend more time growing your business and better serving your clients. In fact, nearly one-third of Orion advisors increased staff efficiency by 50-75% or more and roughly half saw a return on their technology investment within the first 12 months of using Orion*!

Click [here](#) to see how Orion can help you keep pace with your rapid growth and the technology needs that seem to be growing faster than that pile of presents underneath the tree!



Santa Eats More Than Just Cookies

AIP

You need more than just cookies and milk for a diversified diet. The same idea goes for investing, which is why we now offer a way to easily capture investment opportunities beyond the standard stocks, bonds, and model portfolio strategies with our Alternative Investment Platform (AIP). AIP enhances your ability to report on alternative investments in Orion and enables your firm to easily create comprehensive wealth reporting for your clients, no matter the type of invested assets.



Every Time a Bell Rings, an RIA Gets its Pay

Bill Pay

Your business is as unique as a snowflake – and so, you need a way to bill beyond traditional AUM to easily and accurately bill your clients for the full scope of

capabilities you provide like financial planning, tax planning, accounting, and more! Whether it is a one-time event or an ongoing fee, our enhanced Bill Pay Feature creates and maintains various fee types so your business can continue to be uniquely yours. Check out our whitepaper or set up a demo here.

Did You Know? Orion integrates with BluePay's payment processing platform to help your firm get paid faster! Find out more here.



But the Prettiest Sight You'll See is the Trading That Will Be

Eclipse™

Santa has plenty of help; shouldn't you too? Our Eclipse™ trading platform creates a fully customizable trading and rebalancing platform to help you create a more efficient trading process and ultimately a better business! Leverage daily dashboards to take quick action right when it's needed, easily monitor your portfolios for tax-loss harvesting opportunities, gain time back in your day with our FIX integration, and lots more! Check out our Eclipse™ page to schedule a demo today!



Oh, the Tax Consequences are Frightful,

but the Technology is so Delightful

ASTRO

The holidays don't have to be scary...and neither do tax-efficient portfolios. With ASTRO, you can use direct indexing to outperform ETFs after taxes, take care of the old and the new by managing legacy positions while transitioning clients to a new strategy, cater to high net worth clients by replicating mutual fund models tax efficiently, align portfolios with your clients' values including ESG considerations, and so much more! [Click here to download our ASTRO whitepaper](#) or chat with an Orion expert!



Even Rudolph Went to Reindeer School

Ascent Online Training

Everyone needs a little guidance once in a while (just ask Santa about that one foggy night). At Orion, we offer powerful, learner-led training to help you and your team maximize your understanding of Orion Connect. [Click here to see how your firm can follow its own unique learning "trail" to maximize the Orion platform and even achieve Ascent certifications!](#)



Over the River and Through the Woods to Ascent 2019 We Go

Ascent 2019

Next year, we're the ones that will be traveling over rivers, through woods and anywhere else that we need to in order to bring Ascent 2019 to you! We're breaking down our acclaimed user event into personal regional events and bringing it to a city near you. Sign up now to receive more personalized product training from our Subject Matter Experts, meet with other influential professionals in your area, and hear how the latest innovations from Orion and Orion's many integration partners can help grow your business. See you there!

Of course, the nicest gift is the one that you've given to us: the opportunity to support you and your business. Whether you're a long-term Orion client or you've just started to look at all of the ways that Orion can help you grow your business, thank you! We wish you a happy holiday season and look forward to a fantastic new year together!

If you have additional questions about what was featured on our wish list, please log into Orion Support and start up a chat with our Reporting SME Team.

Not an Orion client yet? Get in touch with us [here](#) to schedule a demo. Happy Holidays!

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