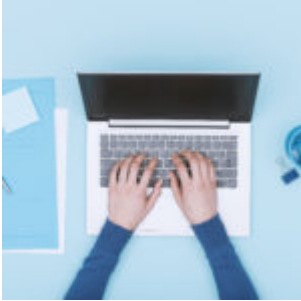


# The Best in Fintech News: The Top 10 Orion Blogs of 2019



From the top fintech news and awards to features on the latest innovations and endless tips for end users, the Orion Blog delivered hundreds of original articles over the past year.

Check out what posts you and all of the other Orion Blog followers read the most with this look at our top 10 blogs of 2019:

## **No. 10: Help Clients Feel the Love**

Orion provides innovative and useful technology to streamline your business so that you can focus on those important client relationships. So, it's no wonder readers enjoyed this Valentine's Day-theme blog in which we created a shortlist of five tools to help clients feel the love in their relationship with their advisors.

## **No. 9: The Need for Search Speed**

We made a jump to light speed in September, improving the Orion Connect search bar in order to get you quicker access to the data you want and need. Check out why this enhancement was so wildly popular with blog readers.

## **No. 8: Launch of Inform**

All RIA firms must meet SEC requirements for personal securities trading. That's why we launched Inform, our new employee trade monitoring tool, in February to help make it easier for firms who use Orion to automate manual processes, such as front-running reviews for firm-wide trading analysis, tracking employee trades

from over 1,000 custodians, and so much more.

## **No. 7: Can't-Miss Summer Tech Hits**

To celebrate the summer solstice, we put together this really popular list of some of our most popular time-saving features to make sure you don't have to spend more time working on tedious back-end tasks. Whether it's the longest day or shortest day of the year, Orion's got your back.

## **No. 6: Tax Loss Harvesting Tips**

For our top Tech Tip Tuesday blog of the year, we explored the tax loss harvesting tools available in Eclipse™ trading and ASTRO. Learn more about how our two premier products provide tax-efficient portfolio solutions.

## **No. 5: Orion Honored with Industry Awards**

At Orion, innovation is at the heart of what we do. And we're super proud to have been honored with several industry awards in 2019. Orion founder and CEO Eric Clarke was awarded the designation of an InvestmentNews Innovator in April, and ASTRO and Chief Marketing Officer Kelly Waltrich were recognized by WealthManagement.com.

## **No. 4: Ascent on the Road**

Instead of one big user conference, in 2019 we took Ascent on the road — from Boston to Santa Monica. In this mid-year update, we shared highlights from three events filled with eye-opening tech training, invaluable networking opportunities, and one-on-one consultations. And don't forget to register for Ascent 2020, held August 31 - September 3 in Scottsdale, AZ!

## **No. 3: Orion Rebrand Announcement**

In April, Orion Advisor Tech's parent company, NorthStar Financial Services

Group, announced the technology company along with FTJ FundChoice (now Orion Portfolio Solutions), CLS Investments, and Constellation Trust Company would be unified under the Orion brand. With all subsidiaries under one umbrella, Orion is now able to deliver a more robust and connected advisor experience featuring both best-in-class technology and investment flexibility.

## **No. 2: Orion Acquires Advizr**

When Orion acquired Advizr, a financial planning and client experience technology platform, in July, we gave advisors the tools they need to connect and collaborate with their clients while boosting satisfaction by exceeding their expectations. Read more about what this means for providing a next-gen client experience.

## **No. 1: Winning the Fee War**

In early October, Charles Schwab announced it was eliminating commissions for online trading of U.S. stocks, setting off a huge disruption in the finance industry. Our top blog of 2019 explored why it's really advisors and their clients who have won this fee war.

Want to parlay our blog tips and fintech news into success for your firm in the new year? Contact us to schedule a demo and find out how Orion can help you simplify processes, streamline communication, and drive growth.

Orion Portfolio Solutions, LLC (OPS) CLS Investments, LLC (CLS), Orion Advisor Technology, LLC (OAT), Advizr, Inc, and Constellation Trust Company (CTC) are affiliated companies through their parent company Orion Advisor Solutions, LLC (OAS).

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