

# 5 Tools to Help Your Clients Feel the Love this Valentine's Day



Roses, chocolates, a flying baby with heart-shaped arrows... Valentine's Day is right around the corner, and we've got relationships on the brain.

What's your Valentine's Day strategy? Do you spring for the big box of chocolates? Go for the full dozen roses? Splurge on that new hot restaurant? Or do you take it another direction and create something sentimental, from the heart?

The choices can leave your head spinning, but they all share one purpose - to make the person you care about feel:

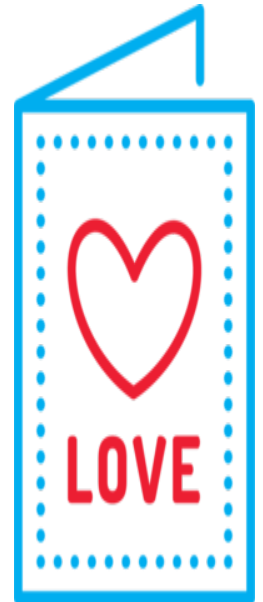
- Valued
- Understood
- Assured that they made the right choice when they chose you ?

But what if you're in a committed relationship with a bunch of people? Yup, you guessed it! We're talking about the relationship between advisors and their clients. How do you embody the spirit of Valentine's Day to demonstrate how much you love and cherish those relationships? Surely there's a better way than buying thousands of Roses (although, maybe Costco has a deal).

Well call us Cupid, because we've got your back.

## Here's a shortlist of things that can help

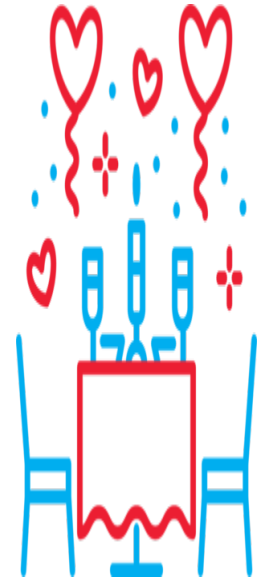
# **your clients feel the love this holiday season**



## **1) More personalized than a homemade Valentine's Day card**

### **Report Builder 3.0**

Which do you prefer, a generic card or one that was made by hand, specifically for you? Going the extra mile shows that you care and with Orion's Report Builder 3.0, you can deliver that individualized experience in each client report. Your clients will love the personalization and you'll love the easy-to-use functionality, with features like dynamic charts and drag-and-drop report design. [Click here to learn more about custom report creation.](#)

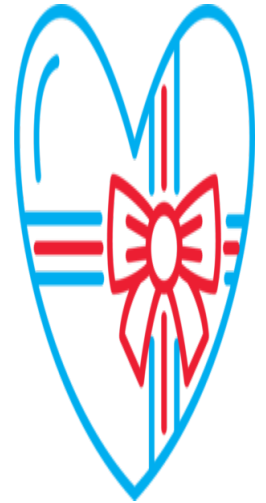


## 2) More engaging than a candle-lit dinner for two

### Engage

Valentine's Day is best spent with your loved ones. And when that entails an entire book of business, you either need 100 clones of yourself or a really great video reporting app.

Orion's turnkey video reporting solution, Engage can help you with video (sorry, we haven't mastered the cloning thing yet). Engage allows you easily shoot video, edit it, and overlay dynamic client portfolio information, such as performance. That means you can take one market commentary video and personalize it for your entire client base - so everyone feels like that special someone. [Click here to learn more about turnkey video reporting.](#)



### **3) More useful than that legend in your box of chocolates (which one is coconut again?)**

#### **Client Portal**

Why do they make those legends to go with a box of assorted chocolates? Because people like knowing where to find the things they want. Surprises are fun sometimes, but not when the stakes are high - like a client's finances or odd chocolate varieties (like orange cream. Who likes those anyway?).

Orion's client portal is the one-stop-shop for all your clients' financial needs. The intuitive navigation and single sign-on help clients seamlessly access important information such as balance sheets, quarterly performance statements, account holdings, and your contact information - so they always have access to what's most important to them. [Click here](#) to learn more about client portal features and options.



## **4) More comforting than a teddy bear**

### **Mobile App**

Your loved ones just want to be close to you, especially on Valentine's Day. While it may be impossible to see every client on any given day, that doesn't mean you can't give them access to the next best thing - your brand.

Orion's mobile app is a custom-branded extension of your client portal, providing quick access to relevant information, like portfolio values, account holdings, performance reporting, retirement calculators, news and market commentary, and your contact information. Learn more about how our mobile app can help your clients take their accounts with them wherever they go.



## **5) More appreciated than a fresh bouquet of roses**

### **SMS Text Notifications**

People love getting flowers for Valentine's Day. They're pretty and they smell good, but they aren't very useful.

Orion's SMS text notifications help you give clients something they will actually use - portfolio updates when they need them. You can pick and choose which data points you want to provide to each client via text, helping them stay up-to-date on the information that matters most. [Click here](#) to learn more about how client SMS text notifications can help you show your clients that you're thinking about them.

### **Coming Soon - Event Based Notifications**

Has Valentine's Day ever snuck up on you? There's nothing like a panic-fueled trip to the grocery store for a box of candy. And roses? Those are long gone. Looks like you're settling for a nice fern. That'll go over well...

Event based notifications are designed to help you avoid those unfortunate oversights at all costs. You can automate notifications (to clients and yourself) based on pre-determined triggers, such as RMD deadlines, account activities, trade notifications, and even birthdays. [Click here](#) to watch our video and see how Event Based Notifications can help you stay in front of those important reminders

and special events.

Valentine's Day is all about celebrating relationships. At Orion, we provide innovative and useful technology to streamline your business so you can focus on those important client relationships.

If you have additional questions about what was featured in this 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. Much love.

0082-OAS-2/1/2019