

Let Orion Take the Luck Out of Vetting Your New Advisor Tech



Ah, St. Patrick's Day – an opportunity to count down the final days of winter by draping ourselves in green and indulging in Irish delicacies and maybe even a beverage or two.

But beyond the food, the drinks, and the parades, perhaps the most resolute tradition of St. Patrick's Day is the concept of "luck."

Luck can play a valuable role in the randomness of everyday life. From a chance encounter that sparks a long-time friendship to a prosperous trip to a certain city in southern Nevada, luck has a welcome place in our hearts.

However, when it comes to running your business, luck is the last thing that you should count on.

That's where Orion comes in. We're here so you never have to chase the proverbial rainbow to find the support you and your business need. Below, we highlight a few of the latest "lucky charms" from Orion designed to simplify the complexities of running a business — no four-leaf clover or lucky horseshoe required.

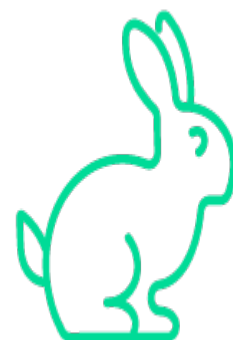


Instead of a Four-Leafed Clover, Count on Inform

When it comes to meeting your firm's compliance obligations, luck simply has no place. And while you can't pin this tool to your lapel, Inform will have compliance officers feeling truly fortunate.

For an additional cost, Inform enables your business to keep up with your Code of Ethics obligations by monitoring employee trades. It is also a solution for maintaining and distributing affirmations, certifications, and disclosures. And while St. Patrick's Day isn't traditionally a gift-giving holiday, Inform allows you to track gift receipts and outside business activities all year round. Inform also provides you with a comprehensive audit trail, so you'll never be relying on luck when dealing with the SEC and state regulators.

To learn more, contact us at Compliance@orionadvisor.com.



No Need for a Rabbit's Foot, Keep ASTRO in Your Back Pocket

With so many ups and downs in the markets, it's easy to believe that luck plays an important role in successful investing. But ask any seasoned advisor or investment professional, when it comes to building strong portfolios - luck has nothing to do with it.

But instead of spending the time and money to manually tailor portfolios to individual clients, we built ASTRO as a solution to automatically construct tax-efficient portfolios for non-qualified accounts. ASTRO creates a target benchmark

portfolio by selecting an index, a blended index, or an existing model portfolio. Advisors can then set any constraints to the target portfolio they would like to take into consideration - including the maximum number of securities, ESG considerations, desired target error, and more.

In other words, while ASTRO can't take the uncertainty out of the markets, it's powerful optimization technology can take the guesswork out of building customized portfolios. And if you'd rather have us do the work for you, stay tuned for ASTRO Advisory Services.



Our Integration with BizEquity May Help You Find the Next “Pot of Gold”

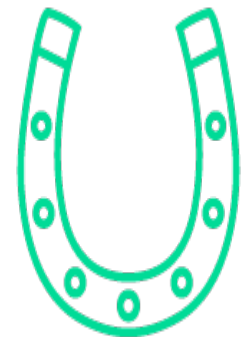
Right now, there's a bright, shining rainbow arching over the wealth management industry. At the end of the rainbow, there's a \$12 trillion “pot of gold,” and we're helping you find it by integrating with BizEquity - the world's leading provider of business valuation knowledge and big data.

Over the next 10 years, 40 million business owners in the United States expect to sell their business. Now here's the statistic that will interest you - less than half of business owners have consulted with a financial advisor. This means there will be an estimated \$12 trillion wealth transfer or liquidation over the next decade to fund these business owners' retirement.

To tap into this opportunity, there's no need to befriend a leprechaun. Orion's integration with BizEquity gives you access to powerful tools to deepen relationships with entrepreneur clients and prospect for new ones. Advisors can also use BizEquity's business valuation tool to discover the value of their own

business.

To get started, contact integrations@orionadvisor.com



Make Your Own Luck at Ascent 2019

You didn't build your business through sheer luck. It takes constant innovating, learning, and connecting. That's what we're providing at Ascent 2019.

Ascent 2019 is our premier user conference, and it's underway right now. If you haven't registered yet – it's not too late. That's because this year, our subject matter experts are traveling to cities across the country, making it easier than ever to discover new opportunities for innovation.

Our goal for Ascent 2019 is to help you find new ways to innovate on the fundamentals of running your business. We're going to show you how simple, scalable technology solutions can result in new value and powerful experiences.

Click below to sign up for one of our upcoming Ascent destinations.

- Scottsdale, March 25-27
- Chicago, May 8
- San Francisco, June 11-12
- Santa Monica, July 10-11
- Boston, August 7-8
- Denver, September 4-6

We hope more than anything that the technology solutions we offer make you feel fortunate to be working with Orion. And, if we haven't been lucky enough to work with your business yet, we'd love the opportunity to start a conversation. Contact

us to see how we can take the luck out of your technology search and help you get back to your enjoying your business again.

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