

3 Reasons You'll Want to Attend Orion's Eclipse™ + Communities Summit



Some things just go better together. Sonny and Cher. Baseball and summer afternoons. Spaghetti and meatballs. And now, you can add Orion's Eclipse™ and Communities apps to that list.

In case you need a reminder, Eclipse™ is our tax-efficient trading and rebalancing platform that gives you all the advanced tools you need to create customizable trading processes that improve day-to-day operations for your team while helping you provide more strategic portfolio solutions to your clients.

Communities, our peer-to-peer model exchange, offers two distinct user experiences. You can either sign up and subscribe to models offered by strategists on the platform like CLS Investments, BlackRock, Russell Investments, and more; or, you can become a strategist yourself and add a new line of revenue to your business by offering your own models to other advisors for a subscription fee.

We've hosted in-person **Eclipse™ + Communities Summits** across the country this year to make training easy and accessible for advisors interested in learning more about the tax-efficient features of these two trading-focused apps.

On June 26 and 27, we're bringing our Eclipse™ + Communities Summit home to Omaha, Nebraska—the city of Orion's headquarters.

If you're looking to get more out of Eclipse™ and Communities, this is one event you won't want to miss. Here are three reasons why you need to attend our Eclipse™ + Communities Summit next month.

Top Three Reasons to Attend

1. Become an Orion Trading & Tax-loss Harvesting Expert through Our Custom Training Tracks

Let's start with the most important benefit of what you'll take away after the two-day Summit: Once it's over, you'll be on your way to becoming an Orion trading and tax-loss expert.

To get there, you can choose one of three ways to experience Eclipse™ and Communities during the Summit. We've developed one track especially for advisors who don't currently use Orion, while the other two tracks focus on meeting the specific needs of Orion users.

Non-Orion Advisors: Lunch & Learn

We've built a special introductory course for advisors who aren't yet using Orion. Join us on June 26 to discover how Orion helps some of the top advisors in the country enjoy their business again. You'll receive an overview of Orion's portfolio accounting software, learn more about the Orion Communities model marketplace, and discover our new portfolio optimization tool, ASTRO.

Orion Advisors: Eclipse™ Essentials

If you're an Orion advisor who wants to implement Eclipse™ or Communities but haven't taken the steps to start, this track is for you. Our team will give you a high-level overview of how these tools can positively impact your trading operations. You'll learn about portfolio setup, customization and preferences, models, dashboards, trade tools and more.

Orion Advisors: Advanced Training

If you're a current Eclipse™ user, you'll receive customized, in-depth consulting in Eclipse™, while also learning how the Communities platform can be a true differentiator. Due to the highly customized nature of this track, you'll schedule time to learn about cash buckets, trade execution best practices, tax logic, system preferences, and much more.

2. Get Personal and Meet the Full Team

Speaking of Orion's staff, we've assembled the dream team of trading experts in our organization. The Eclipse™ + Communities Summit is the only event where they'll all be together in one place to give you the essential and advanced training you need to get your firm fully running on Orion's trading apps.

The Summit is your chance to:

- Learn about tax-loss harvesting from **Orion's Trading Product Managers**
- Hear from Communities expert **Katie Muldoon** about adding industry-best investment strategies to increase client choice
- Discuss the efficiencies you can gain through integrated trading technology with VP of Managed Accounts, **Sean Hollingshead**

In addition to hearing from our team, you'll get the chance to receive hands-on training and consultation to help you finetune your use of our apps with your firm's unique setup in mind.

3. Experience The College World Series Championship Game

We saved one of the most exciting reasons for last! Come to the Summit and you'll receive a complimentary ticket to attend the College World Series Championship game on Tuesday June 26th at TD Ameritrade Park. This perk makes the Summit a *must* for any baseball fan. The game will also be a great opportunity to enjoy additional relationship building with your Summit peers.

The College World Series for men's baseball has been an Omaha summer tradition since 1950, and TD Ameritrade Park hosts the action in a major-league class venue. Beginning on June 16th, this year's tournament culminates in a best-of-three championship game series held June 25th through 27th. Our group will attend the second game in the championship series.

Space is limited at the Eclipse™ + Communities Summit, so click here now to select your training agenda and reserve your seat at this can't-miss event.

Want to learn more about the apps covered in this article? Download our

white paper on using tax alpha and Eclipse™ to set your firm apart from the competition, or read more about Communities on the Orion blog.

0306-OAS-5/30/2018