

5 Virtual Sessions You Won't Want to Miss at Ascent 2021



We're so excited for Ascent this year—we can hardly contain ourselves. Each of our virtual sessions promise to be thought-provoking, eye-opening, and full of practical takeaways, but we can only highlight so many in one article, and you can only attend so many sessions from your laptop in two days.

Want to learn more about every session? Head over to the agenda page for an overview.

Today, we want to highlight five live-streamed sessions you won't want to miss at Ascent.

1. Get the First Look: Automated Account Workflow

Speakers: Brian Morgan, Product Director of Financial Planning at Orion and Dylan Mahler, Director of Product Design at Orion

Done right, technology can increase efficiency with your firm's account opening process, and ultimately improve client service and accelerate growth.

All too often, though, firms get overly excited at the prospect of automating in theory rather than in practice. As a result, automations may be set up that don't fully support the existing workflows advisors use.

Together, Brian Morgan, Orion Product Director of Financial Planning, and Dylan Mahler, Orion Director of Product Design, will review our Automated Account Workflow (an upcoming release!) and how it can assist with your current processes and provide a solution for smaller accounts. Your clients and prospects

alike will have the ability to open accounts in a fully digital experience.

2. How Ordinary Businesses Transform Into Irresistible Brands

Speaker: Robert Sofia, Chief Executive Officer at Snappy Kraken

The financial advice industry is fiercely competitive and it's becoming harder to capture prospects' attention. How can advisors market themselves in a way that is captivating and irresistible to prospects? How can they blend out instead of blending in?

Spend some time with Snappy Kraken's CEO Robert Sofia to hear real-life examples of companies that have revived their brands and revolutionized their industries and find out how to transform and transcend your firm through a clearly defined set of actions.

3. Goals-Based Investing: The Power of Why

Speaker: Dr. Daniel Crosby, Chief Behavioral Officer at Orion

Dr. Crosby always provides engaging, thought-provoking presentations, whether it's at a TEDx event or at Ascent. If behavioral finance is the future of financial advice, then he is leading the charge.

In this session, Dr. Crosby will talk about the power of "mental accounting," and how it affects the way clients spend, save and invest.

You'll learn about how leveraging goals can help put the power of purpose behind your financial plans for clients. When clients have a better understanding of the purpose behind their plan, magic happens. Irrational behavior is constrained and client goals come alive in new ways.

4. Recruiting & Developing the Next Generation

Speaker: Kate Healy, Managing Director for Generation Next at TD Ameritrade Institutional

As TD Ameritrade's Managing Director for Generation Next, Kate Healy has

helped create resolutions for the talent crisis confronting the financial industry by opening doors to those who aren't traditionally represented in the field: new graduates, individuals changing careers, and military veterans.

Learn what you should start implementing now to hire, and develop, the next generation of talent for the sustainability and growth of your firm and clients.

5. Next Level Marketing: Create Leads, Improve Relationships, & Drive Success

Speaker: Stephanie Sager, Market*r Subject Matter Expert at Orion

Cost per click, engagement, conversions, optimal posting times, evergreen content—modern marketing can often feel like a confusing web of jargon, data, and hidden costs.

It's easy to get in over your head and lose sight of your overall goals. But it doesn't have to be so complicated. With the right knowledge and tools, you could build a winning strategy.

In this session, you'll learn how Orion's Market*r tool enables your firm to build a winning (and scalable) growth strategy.

Haven't registered yet? Time is running out! Head over to the Ascent site to register for our virtual experience now.

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