

Adding Value for Your Clients Amidst Market Volatility



With our nation shaken by uncertainty—skyrocketing unemployment, struggling small businesses, and a volatile market—it's now more important than ever for financial advisors to continue providing value for their clients.

The good news? There are concrete ways to do that—and powerful tools to help.

Financial Planning

During periods of market volatility, you're probably spending time managing not only your clients' portfolios, but also their emotions. It's easy for investors, who may not have deep industry knowledge, to see the market reacting to the COVID-19 pandemic and immediately want to react themselves.

But financial planning grounds your clients in their long-term financial goals, helping to keep them from making hair-trigger decisions based on what they see on the news every day.

What's more, Monte Carlo simulations and 'What if' scenarios help to ease concerns about the impact situations like COVID-19 will have on the future of their financial health. The ability to look at projected outcomes based on real facts and figures can prevent clients from spinning out worst case scenarios in their heads.

Research backs up the value of financial planning tools and techniques during other times of crisis, including the Great Recession in the early 2000s.

Orion is offering free, self-guided access to our financial planning platform as part of our Business as Usual program, developed to help advisors continue serving

their clients during these uncertain times. If you're interested in learning more, [click here](#).

Consistent Communication

Communicating effectively with your client is always important—but especially during times of market volatility, when they may have additional concerns or simply need reassurance from an expert, it's critical to be accessible and responsive.

And during these uncertain times, there are a few key communication factors that perhaps you wouldn't normally need to consider:

- Be proactive; don't wait for your clients to reach out first. Let them know you're thinking about them.
- Address expectations for future market changes. When you speak with your clients about their concerns, help them understand that while this is a difficult time, historically, the markets have bounced back.
- Stay informed. Clients will be looking to you for thoughtful market insights, not the same information they're hearing on the news. Be sure to reference key industry leaders and brands you trust in your communications; Orion has set up a communications resource center to help advisors do just that.
- Be straightforward about their portfolios. Don't sugarcoat what's happening in the markets; instead, be honest, but also keep them apprised of what you're doing to make sure they stay on track to meet their financial goals.
- Look for new ways to distribute your messages. As a whole, our country is drinking from a proverbial firehose of information right now. To help your communications stand out, consider using different channels or mediums—such as social media, digital content, and webcasts—to deliver accurate, timely commentary.

Bridging the Gap

If financial planning and communication are powerful on their own, imagine what they can do together. Engaging investors in the planning process begins with marketing and communication—content that resonates with their unique situations and begins to form a connection between what they need and the

financial planning process.

Orion's brand new marketing solution, Market*r, can help. Customizable content campaigns built around relevant financial planning topics, including market volatility, function in lockstep with best-in-class marketing execution technology to help you increase engagement, capitalize on new opportunities, and provide your clients with the thoughtful communication they need.

But Market*r goes a step further, working in tandem with the Orion Planning platform to guide clients and prospects through intuitive financial planning workflows and help you more easily follow up on leads.

Ready to get started with Market*r? Request a personalized demo [here!](#)

0962-OAS-4/14/2020