Advisors’ Top Questions About Flipping the Switch For the New Client Portal

Comprehensive, modern, and intuitive, the new Client Portal does more than enhance the client experience: it seamlessly places you at the center of your clients’ financial well-being. It allows your clients to view financial planning and portfolio data side-by-side, helping to draw the valuable connection between progress toward goals and investment strategy.

Many Orion advisors have already made the switch to the new Client Portal experience and have had some great questions along the way. We want to set you and your clients up for a smooth transition and top notch client experience. We’ve compiled the top questions we get about transitioning to the new Client Portal, so that you can be confident in your tech and provide your clients with a best-in-class experience.

What do my clients need to do to switch?

Client experience is paramount to advisors and us at Orion, so we put in the work to ensure switching to the new Client Portal would be as smooth as possible for your clients. It's actually as easy as flipping a switch. When you give us the word that you want to switch to the new Client Portal, our team will put a redirect in place and flip a switch. Your clients will use the same URL and same Client Portal login for the new experience. Plus, all their investment data, documents, and account balances will be there waiting for them in this sleek new experience.

How much work goes into setting up the new Portal?

Like we said earlier, it's as easy as us flipping a switch for you! If you're picturing a guy in a big control room full of switches, blinking lights and beeping, you're absolutely spot on. Jokes aside, we do the background work so that most of your data is pulled into the new Client Portal. We even pull over your color theme so it's already set up. You can preview what your client's experience in the Portal will be like before you share it with them. Taking it one step further, we've also put together communications that you can share with clients about the New Client Portal, including an email and fact sheet, and a customizable marketing video.

If I'm not ready to dive in, can I test it out?

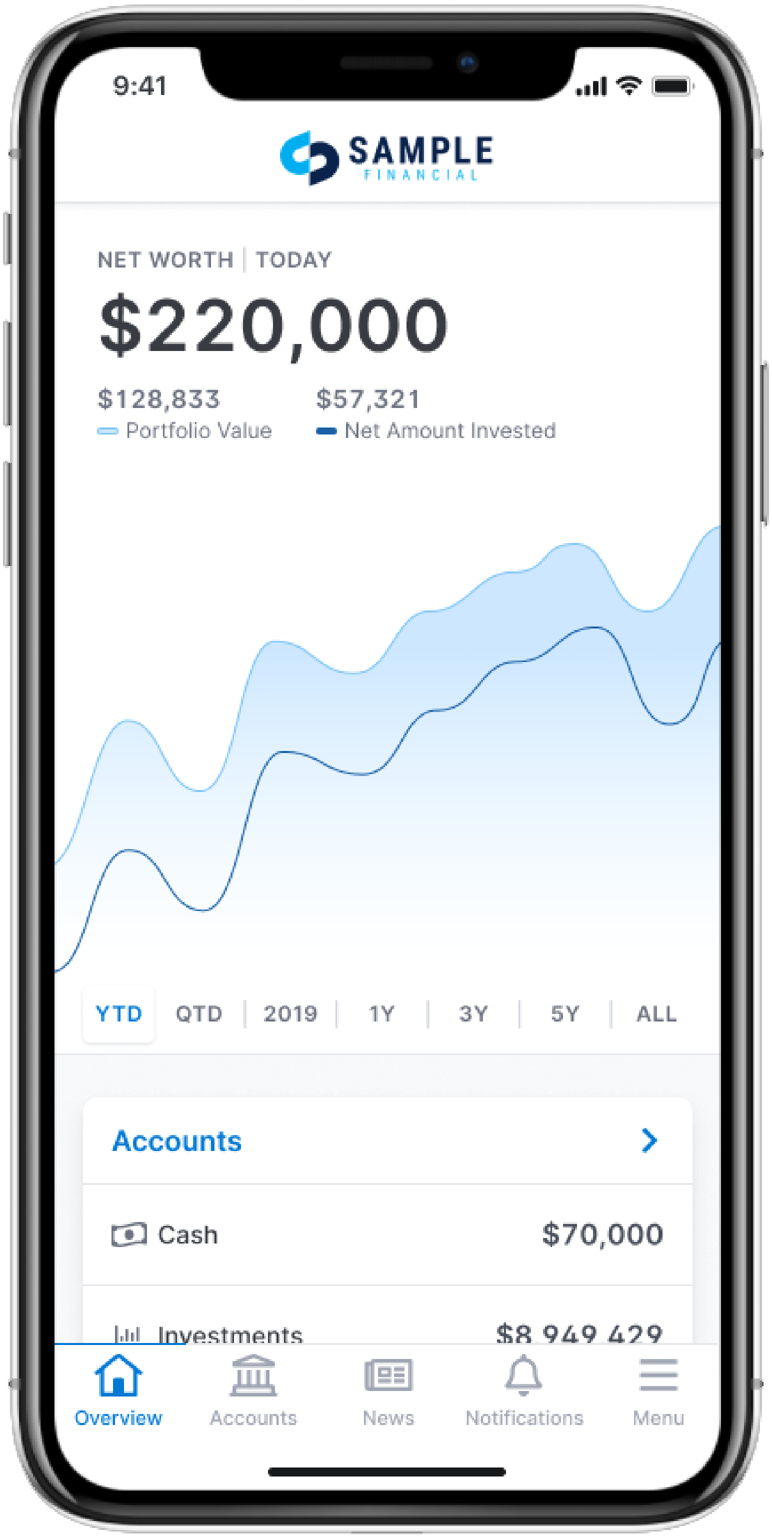
Change can be scary, especially when you're making a change for your clients, as well as yourself. So if you're not ready to dive head first into the new Client Portal experience, we've made it possible to dip your toes into the experience first. Our team can help you test out the new Client Portal with a small group of clients, while you still maintain the Legacy Client Portal for your other clients. Once you've had some time to test out the new experience, you can let our team know when you're ready to flip the switch to get all of your clients into the new experience.

What if I'm already using another financial planning tool?

If you are already using a financial planning tool such as eMoney or MoneyGuidePro, the good news is both of these tools integrate with the New Client Portal. Using Orion's financial planning tool, Orion Planning, does offer the best experience though, providing more integrations and features. Orion Planning is available to Orion clients at no additional cost, so if you did want to test out the tool, you can keep some clients on MGP or eMoney, and test out Orion Planning with a smaller group of clients.

What's this about an app?

The rumors are true, we've got a best-in-class mobile app coming for the new Client Portal! This app is still being tested before we officially release it, but we will be sure to let you know when it's ready in a few months. Using this new app will require that your firm be set up in the new Client Portal first, so we recommend making the switch now so that you can be among the first to get the app!



Get a demo of the Client Portal here.

Let’s Get Started! Get connected with our team to start making the switch to the new Client Portal. Not yet working with Orion? Let’s talk!

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