

Gain Valuable Time & Increase Productivity with Orion's Professional Services Team



Study after study shows that advisors who spend more time with their clients can grow faster and operate a more profitable business. Orion's Professional Services Team is ready to take on your back-office operations and alternative asset management, so you can focus on what you do best: building relationships and growing your business.

You choose how you want to work with us. Whether you need ongoing support as an extension of your team, or on a project-by-project basis, this elite squad is highly trained to help you maximize your technology experience —saving you time and resources.

What is Orion Professional Services?

The Orion Professional Services team is a team of subject matter experts who are available to assist your firm with back-office operations. Financial advisory firms have relied on Orion Professional Services to help with closing resource gaps, executing special projects, assisting with alternative asset management, and streamlining their data.

So, if you have a resource gap, or you are spending more time on your data than with clients, it may be time to see what the Orion team can do for you.

Support to Fit Your Firm's Needs

Our dedicated Orion Professional Services team is staffed with experts whose

goal is to ensure that you get the most out of your Orion experience and better streamline your back office. This solution is designed for firms of all sizes — whether you're new to Orion or you're an experienced user, you can choose the level of service that best supports your unique needs.

Alternative Asset Management

Since alternative assets are held outside of the traditional investment structure, they bring with them a unique set of challenges for financial advisors who want to include them in total wealth reporting for their clients. Our team can help streamline your alternative asset management, improve accuracy and save your firm time and money.

Project Services

This customized level of support enables you to get relief on your most resource-draining tasks, including statement entry, account linking, and client data inputs.

Ongoing Support

Simplify your technology support and its cost with an ongoing support agreement. Our team of experts will assist with account setup, quarter-end processes, billing, reporting, and data audit services.

Designed to Help Grow Your Business

With the help of the Orion Professional Services team, you can get more out of Orion's technology without having your staff take on the task of mastering all of our robust tools, access cleaner data with less effort, and receive full-time expertise for the cost of a part-time employee.

Contact us to hear more about how the Orion Professional Services Team can help your firm.