

Ascent 2018 Day 2 Recap: Alligators, Speed Boats, and Gangsta's Paradise



On day two of Ascent 2018, it was all about the activities.

We packed our time with another morning full of education sessions and started the day with a technology discussion featuring three of our very own advisors. But in addition to all the learning opportunities, we also reserved a large part of the day to be a “thank you” to all the advisors attending.

Once courses wrapped up a little after 1 p.m., we all headed out to take in Miami Beach. Some went to the Everglades, some went on food tours, some packed meals for the local community and others raced on speed boats in the open water.

Check out today’s post to learn more about the day’s keynotes and what else you missed.

Keynote Recap

Advisor Panel - The True Differentiators of Success

The morning began with a powerhouse panel of advisors. Orion EVP of Business Development, Kyle Hiatt, moderated a discussion with Dean Zayed of Brookstone Capital Management, Mark Dupont from Focus Financial, and Aaron Schaben from Carson Group.

The group covered a wide range of topics, from the importance of using technology to bolster client service to expectations for advancements in business intelligence analytics that will enable advisors to make smarter decisions for

growing their firms.

Here's a couple quick highlights from the panel:

To get CRM adoption, a game-and-reward system works to drive adoption. The roll out is key. Turn on 20% of functionality, and then increase it from there, says Mark Dupont @FocusFinancial about technology roll out #Ascent2018

— Orion WealthTech (@orionwealthtech) September 6, 2018

"Advisors want great technology, but then they don't use it. Why not? It helps the back office, but there's also a potential for advisor and client adoption alike. @DeanZayed @BrookstoneCM weighs in at #Ascent2018

— Orion WealthTech (@orionwealthtech) September 6, 2018

Stephanie De La Hoz, Community Engagement Manager for Rise Against Hunger

During the lunch hour, we heard about the mission of Rise Against Hunger. The international hunger relief organization delivers food and aid across the world, with a goal of ending world hunger by 2030. This year, the charity aims to provide 85 million meals to those in need.

In the afternoon, we took action on what we heard and followed up with a meal packing event in partnership with Rise Against Hunger to help feed families around the world. Our volunteer attendees packaged over 15,000 meals, which are scheduled to be shipped to the Northern Haiti.

If you'd like to learn more or get involved beyond Ascent, [click here](#).

One Thing You Should Know

Our billing apps do more than calculate and track payments with a seamless, end-to-end approach. The Advisory Fee Benchmark Tool also gives you a chance to compare your fees against the industry at large by stacking them up against the other advisors using Orion.

In Case You Missed It

We have to show some love to the group at Fuse 2018. Many of our integration partners are hard at work building game-changing technology for your firm. Each year, the developments from Fuse drive new innovations that quickly make their way to Orion's clients and this year will be different.

But amidst all that work, we know how to have a little fun...as these giant inflatable duck rafts prove.

Something Fun

Later on, we threw one final client appreciation event and welcomed some of the 90s biggest hip hop artists to the LIV nightclub: Coolio, Young MC, Rob Base, Tone Loc, Doug E Fresh, and The Sugar Hill Gang.

In tomorrow's post, we'll share some of the best moments from the concert and give you one last update from Ascent 2018.

Did you miss yesterday's blog? [Click here](#) to see what happened on day one.

Don't work with us yet? Make sure you're at Ascent 2019. [Click here](#) to speak with our sales team to see how Orion's portfolio accounting solutions can support your firm.