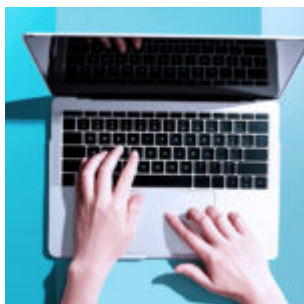


Can't-Miss Product Releases Hitting Our Platform This Summer



Traditionally, summer has been a time to relax, slow down, take it easy.

But when has Orion ever done things the traditional way?

This summer, we're not slowing down. We're working harder than ever to deliver on our mission to elevate the functionality of, and connectivity between, the tools and resources you rely on every day to engage your clients and power your growth.

And we're excited to start sharing them with you! Below, you'll find our powerful product releases coming your way this summer.

If you'd like a personalized look at any or all of these new developments, don't hesitate to schedule a demo now!

1. The Reimagined Orion Connect

From your feedback and ideas, we've reconceptualized, reimagined, and redesigned your home base: Orion Connect. The new dashboard experience, coming your way at the end of the month, starts with what's most important to you.

While the apps you know and love are still available, we've made it easier and more intuitive for you to surface, analyze, and take action on the information that matters most to you. The flexible, customizable layout allows you to use dozens of cards to prioritize critical data and workflows, while a seamless flow of information through the system helps improve efficiency and productivity.

Your new dashboard can be personalized at the admin, firm, or rep level, giving

you the flexibility to decide exactly what you want to see first as your day begins, and empowering you to take quick action on items that need immediate attention.

From the new Orion Connect, you can:

- Enhance productivity by running reports and adding new accounts right from the home screen
- Access client data faster with a simple search function that opens account summaries, goals, allocation details, and performance information
- Stop jumping between apps with a contextual sign on to the Client Portal

Bringing us, conveniently, to our next update.

2. One Powerful Client Portal

First, there was the legacy Orion client portal, built to support our core portfolio management solution. And with the acquisition of Advizr (now Orion Planning) came a second client portal.

More isn't always better.

Reported low levels of client portal adoption throughout our industry (10-12%) got us thinking: Maybe one portal is plenty.

And when it's a portal like this, there's no maybe about it. The new Orion client portal combines the power of our two portals with some groundbreaking new features to create a dynamic, intuitive, personal financial management experience for your clients—all from a single place.

Using the new client portal, which they can access with any device including mobile, clients will be able to:

- Update financial plans and goals
- Aggregate financial accounts
- Store, share, and access documents via a document vault
- Co-browse with their advisor, or schedule a meeting
- View investment performance

But that's not all: Clients will also benefit from our new integration with Apex Clearing. Instead of the traditional account opening process—tedious, back-and-

forth paper pushing that can take days or weeks—Apex enables clients to open accounts directly from the Client Portal within minutes. They can also easily fund those accounts through ACH transfer. From there, these accounts will appear in the Orion Connect New Account Center, and be added to the overall household asset allocation.

The new Client Portal is one way to engage investors. Ready for another?

3. Orion Market*r

Technically, we launched Market*r, our marketing automation platform, back in April. But Market*r is the prospecting gift that keeps on giving, with more features and campaigns being added on a regular basis.

In case you missed it the first time around, Market*r combines customizable, professionally designed campaigns on top-of-mind financial planning topics with best-in-class execution technology to help you both increase client engagement and fill your funnel with more qualified prospecting opportunities.

Since its inception, Market*r has been making waves with its unique ability to drive client and prospect engagement specifically through financial planning. But we're nowhere near finished adding fuel to this engagement engine. Brand new campaigns on relevant, timely financial planning themes—such as Debt Management and the New Normal— are being added on a monthly basis. We're also empowering you to capitalize on the virtual event revolution with features that help you promote your event, pass along critical information, generate key takeaways, and follow up with your attendees.

And with all the prospects sure to be hitting your pipeline, you're going to need an efficient, scalable way to create personalized portfolios for your new clients.

4. Communities: More Than a Model Marketplace

Just like Market*r, Communities, our robust model marketplace, hit the wire earlier this year. And also like Market*r, Communities keeps getting better.

Communities offers access to models from a growing list of big brand, boutique, and emerging money managers across fixed income, equities, and alternatives, empowering you to more efficiently create personalized portfolios that account for each client's risk tolerance and financial goals, all while retaining full trading

discretion.

To keep up with the success we've seen from Communities subscribers, we're continuing to add strategists and models, including State Street Global Advisors, Saratoga Research & Investment Management, Synergy Financial Management, LLC., Fidelity Investments, Lazard, and Wilshire Associates.

But that's not all. Keep an eye out for Communities Corner, a fully stocked resource center with market commentary, strategist fact sheets, best practices guides, and more, going live soon!

Coming Soon: Even More Product Updates

Did you think that was everything? Continuous innovation is what we do best, and we're not stopping anytime soon. Be on the lookout for more trading enhancements and advisor experience updates coming your way later this year!

See why there's no time to slow down this summer? To learn more about all of our exciting releases, [click here!](#)

For a personalized look at Orion's robust suite of solutions, get in touch with us!

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