

# Communities' Latest Strategists in Action: Four Model Marketplace Webinars



Like all communities, Orion's model marketplace continues to grow, adding new model portfolios and investment strategists on a consistent basis to provide our advisors with the flexible options they need to meet their clients' unique objectives.

And *unlike* cookie-cutter communities with houses that all look the same, each strategist that helps make up Orion Communities is special, bringing a one-of-a-kind focus and distinct investment philosophy to the model marketplace.

To help familiarize you with our new strategist offerings, we invite you to watch our on-demand webinars. During the presentation, you'll hear from the strategist themselves as they introduce their models and highlight how their areas of expertise could best benefit your business.

## **Frontier Asset Management's Downside First Focus**

Is managing risk a priority for your firm? Then you'll want to tune in for this overview of Frontier Asset Management, a boutique asset management firm founded in 2000 and based in Sheridan, Wyoming.

CEO Rob Miller, CFA, joins Director of Investments Cliff Stanton, CFA, and Director of Operations Erin Foote to explore:

- Frontier's Downside First Focus investment philosophy
- Their forward-looking approach to building long-term future return expectations

- How they identify skilled managers to fill target asset allocation pie charts
- Their process for creating dynamic, risk-defined model investment strategies designed for long-term investors
- Why their Wyoming roots present such a powerful advantage

[Click here to watch now!](#)

## **The Yin and the Yang of Logan Core**

Yin and yang might be terms you'd expect to hear from a yoga instructor, not an investment strategist—but the Logan Core 60/40 portfolio is all about balance. During this webinar, Director of Management Accounts, Dan Beckworth, and Stephen Lee, Principal and Portfolio Manager, explore how Logan Capital differentiates its 60/40 portfolio by breaking down its two distinct and complementary Growth and Value Investment processes.

Combining two highly non-correlated portfolios into one and rebalancing the allocation targets semi-annually helps the client portfolio perform consistently through a complete market cycle and provide solid risk-adjusted returns.

[Click here to watch now!](#)

## **Polen Capital - Valuing Diversity when Constructing Growth Portfolios**

An ex-private equity attorney, a top gun pilot, and a navy midshipman walk into an investment management firm...no, it's not a riddle or a new George Clooney movie, it's the team of co-portfolio managers at Polen Capital.

Tune in to this webinar to find out how Polen Capital leverages diversity and depth of experience to build a strong growth portfolio, and take a closer look at the four strategies available on Orion Communities.

[Click here to watch now!](#)

## **iCM Tactical Income - Return in a High**

## **Valuation, Low Interest Rate World**

Is the 60/40 portfolio dead? Critics point to historically low interest rates and expensive U.S. equity valuations as contributors to what could become another lost decade for the traditionally balanced investor.

Integrated Capital Management, or iCM, may have the answer: Think outside the traditional ETF and mutual fund box. Join iCM's Director of Investments, Ryan Lehman, CFA, as he discusses the iCM Tactical Income strategies, a suite of portfolios that strives to increase yield, own undervalued assets, and purchase discounted closed-end funds to confront the problem of traditional ETFs and mutual funds.

[Click here to watch now!](#)

### **Bonus: Go Live with Orion and BlackRock!**

We're excited to announce that the Orion Portfolio Solutions Megatrends model portfolio is now available on Orion Communities!

During this live webinar, Orion's Chief Investment Strategist, Rusty Vanneman, CFA, CMT, and Jeff Spiegel, BlackRock's Head of U.S. iShares Megatrend and International ETFs, discuss the powerful benefits of thematic investing for both advisors and clients, and take a closer look at the newly introduced Megatrends model portfolio.

Don't miss out! [Click here to register](#) for the live event on Tuesday, March 30 at 3 PM CT/4 PM ET.

If you haven't subscribed to Orion Communities yet, what are you waiting for? Find out more about our model marketplace and learn how you can subscribe today.

[Get Started!](#)

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