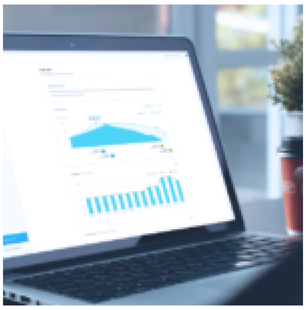
Coming Soon: Engage and Empower Your Clients with a Single Portal



Ask any financial advisor about the most important component of his or her practice, and undoubtedly the answer will have something to do with client experience. After all, clients are the heart of any advisory firm—as an advisor, you rely on their continued satisfaction, loyalty, and referrals to grow.

And in today's world, technology is a critical component of the client experience, in the financial industry and beyond. Because the truth is, clients aren't judging your technology against the advisor down the road. They're comparing it to the experience they have with digital giants, such as Netflix and Amazon.

The baseline for that experience? The client portal.

But there's a major disconnect in our industry between the importance of client portals and the rate at which investors adopt them, which is dismally low: 10-12%*.

What's the reasoning behind this low engagement?

- Login fatigue
- Cluttered, non-intuitive user interfaces
- An inconsistent experience

And overall, too many portal options.

Solving the Portal Problem

At Orion, we've long offered a legacy client portal, built to support the core Orion portfolio management solution. Through the white-labelled portal, advisors can permission clients to access key portfolio information including quarterly performance reports, balance sheets, investment details, and more.

In addition, the Orion Planning platform, formerly known as Advizr, also offers a dynamic client portal to support its powerful financial planning tools. Within this portal, clients can aggregate accounts, view their financial plan, address any action items, and both access and upload key documents.

At Orion, our goal is always to help advisors serve their clients to the absolute best of their ability. And considering the data on low client portal engagement, combined with the pressure on advisors to deliver a remarkable digital experience, we began thinking about how we could help advisors provide holistic access for their clients in a way that offered consistency across all platforms, without the need for multiple logins.

Amazon customers don't log into one account to buy books and another to purchase clothing. Netflix users don't have one app for TV shows and another for movies. Why couldn't we offer that same streamlined experience at Orion?

The One Portal Project

The Orion One Portal Project will combine our two portals into a single platform for clients to access all the tools they need to manage their wealth and collaborate with their advisor.

This single portal will:

- Display financial planning and portfolio data side-by-side to empower more effective collaboration and conversation
- Streamline both advisor and client workflows
- Create a firm-specific look and feel supported by Orion's premier planning, reporting, and portfolio management tools

And for your clients, the value of the consolidated portal goes far beyond the convenience of a single log in:

- **Transparency** into financial plans, portfolio performance, progress toward goals, and more—all the information they need to view their full financial picture, available from a single, secure portal.

- **Customization** capabilities allow you to determine exactly what every individual client sees upon logging in, eliminating the confusion of unnecessary modules and surfacing the tools that are most important.
- **Guidance** they need from you, via a Document Vault that allows effortless uploading of relevant resources, as well as easy-to-address action items and next steps.
- **Connection**, service, and support through co-browsing, screen sharing, and video chat functionalities.
- **Engagement** with their financial lives and long-term goals, along with the necessary steps they need to take to be successful.

Effortless Account Opening

In addition to the ease and accessibility of a single portal, clients will also benefit from Orion's new integration with Apex Clearing.

While traditional account opening is still conducted with monotonous, back-and-forth paper pushing that can take days or even weeks, the Apex integration will enable clients to open accounts directly from the Client Portal within minutes, fund those accounts through ACH transfer, and view their performance. Those accounts will appear in the Orion Connect New Account Center and be added to the overall household asset allocation.

What Does the One Portal Project Mean for…

End clients who currently use the existing Advizr portal? It's the same portal they already know and love, only better. In addition to current functionality, such as client access to financial planning data and account aggregation, the portal will also include powerful new features: performance reporting, a suite of new reports, increased white label capabilities, and more.

End clients who currently use the legacy Orion portal? An elevated experience that combines the features and functionality they need from the legacy portal with the enhanced capabilities of the Advizr portal. Reporting, quarterly performance reports, screen sharing, and more legacy elements will be added to the Advizr portal so you can truly deliver all the elements of your client experience, from financial planning to performance reporting, all in a single place.

Net new end clients? A holistic, comprehensive experience, right from the start.

Net new end clients will have access to the consolidated single portal, where they will be able to access their full financial picture from day one, as well as take advantage of the streamlined workflow and robust collaboration opportunities the single portal empowers.

Finally, what does the One Portal Project mean for you as an advisor? To put it simply, it places you at the center of each client's financial world. By encouraging your clients to adopt the single portal, you're handing them the tools, performance metrics, action items, documents, and resources they need to stay fully informed about their financial lives.

By providing your clients with the modern, streamlined experience they've come to expect from today's digital environment, you make staying engaged with you and your firm as easy as accessing their new favorite show on Netflix.

Ready to take your client experience to the next level? Sign up to learn more about Orion's powerful new portal, coming soon.

*Celent Financial Research

1683-OAS-07/01/2020