

Create Seamless Proposals with Orion & Riskalyze



Onboarding can be the most stressful part of the client experience, for both investors and advisors.

But it doesn't have to be.

Orion's new integration with Riskalyze empowers you to take your clients from *proposal* to *invested* in almost no time at all.

Ready to learn more?

The OG Integration

Orion and Riskalyze have had a powerful partnership for years, highlighted by a single sign-on (SSO) integration allowing you to launch from Orion to Riskalyze. Once in Riskalyze, you'd search for a linked household, or create a new household in Orion Connect and then link the household. You could then build a proposal comparing the investment risk of the client's current portfolio to the risk of the proposed portfolio—in order to propose a portfolio that best aligns to the investor's Risk Number®.

But here's the thing: once a proposal was completed, it stayed in Riskalyze, meaning you had to download it from Riskalyze and manually upload it to the correct client record in the Orion Client Portal.

Well, that's no fun.

The Remix

We've changed a couple of things to get your clients invested in a quicker, more seamless way.

Now, you can SSO from Orion to Riskalyze through contextual links via the New Account Center, Portfolio Audit, and/or Household Overview apps. When in Riskalyze, simply generate a proposal per the same process as above.

But now, once your proposal is completed, it can be synced back to the Orion Client Portal as a PDF—so you and your clients can easily review it together, or on your own.

Efficiency gained.

Even More Integration Swag

The Riskalyze + Orion partnership goes beyond this most recent integration enhancement. As a reminder, you can take your team's productivity to the next level by keeping your client's Risk Number front and center in all of your Orion reporting, using these additional integration features:

Client Portal

Enable the Riskalyze integration in your client portal to display each client's personal Risk Number and the Risk Number of their portfolio, so they can see how closely aligned they are at any given time. You can also include the client's 95% Probability Range to build their confidence in their portfolio over time, as well as display their Retirement Map, so they visualize important life events leading to their retirement date.

Orion Reports

A dedicated Riskalyze sub-report in Orion Report Builder means you can display the Risk Number in any report you want.

Insight Tile

Keep your client's Risk Number on the agenda during your next meeting. Insight, Orion's client presentation app, features a Riskalyze tile, as well as the option to add tiles for the 95% Probability Range and Retirement Map.

Ready to streamline the proposal process and get you clients invested more quickly? [Click here](#) to register for our upcoming webinar, which takes place Oct. 24. For more information, you can also visit Riskalyze's website.

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