

Customize Your Tech Stack with the Right Integrations for Your Business

As COVID19 continues to impact our daily lives and many of us take on additional responsibilities—from homeschool teacher to workout coach, and even part-time IT person—one thing remains constant: the need to serve your clients and run your firm.

That’s why even in these uncertain times, we’re staying true to our promise to help advisors manage their business and investors thrive as much as possible.

And with roughly 100 [integrations](#) from leading financial partners—including some recent enhancements such as [Schwab Advisor Services](#), [Salesforce](#), [factorE](#), [Riskalyze](#), and [Benjamin](#)[™]—you can build the tech stack that your firm needs to run smoothly in any market environment.

Read on as we take a look at how you can find, research, and set up an integration in order to build the tech stack your firm needs right now.

Accessing the Integrations Center

If you don’t see the Integrations app in Orion Connect, navigate to the Manage Users app and select “Roles.” From there, you can enable the Integrations app for any advisor-level users in your firm who you want to have access to integrations. Next, open the Integrations app by navigating back to the main dashboard and clicking on the app tile.



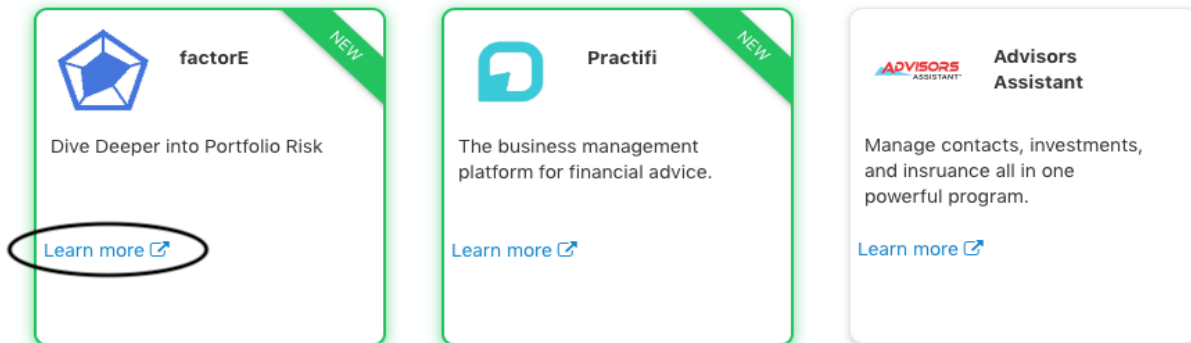
Browsing Orion Integrations

Now that you have access to the Integrations Center app, you can start exploring the 70-plus integrations we offer within Orion Connect. New and featured integrations are located at the top of the screen. The rest are arranged alphabetically. You can either scroll or use the search feature on the right side of the screen to find the integration you're looking for.

The screenshot shows the Orion Integrations Center app interface. At the top left, there is a breadcrumb trail: Home > Integration Center. The main area is a grid of nine integration tiles. Each tile includes the partner's logo, name, a short description, a 'Learn more' link, and either an 'Add' or 'Edit' button. The tiles are: 1. Advizr (Featured): Digitizing Financial Planning - Deliver more plans, help more clients! 2. Fidelity Wealthscape (Featured): Fidelity® provides advisors access to technology tools via WealthscapeSM. 3. Riskalyze (Featured): Helping you build a portfolio that contains the right amount of risk. 4. Schwab (Featured): Schwab Advisor Center integrates custody data with leading RIA technologies. 5. TD Ameritrade Veo One® (Featured): Veo gives you the flexibility and control to run your business your way. 6. Benjamin (New): The world's first digital assistant created for advisors by advisors. 7. factorE (New): Dive Deeper into Portfolio Risk. 8. Practifi (New): The business management platform for financial advice. 9. Advisors Assistant: Manage contacts, investments, and insurance all in one powerful program. On the right side, there is a sidebar with a search bar labeled 'find integrations', an 'Installed Only' checkbox, and two filter dropdown menus: '-Filter By Type-' and '-Filter By Point-'. At the top of the sidebar is a 'Show All Integrations' button.

Each integration is presented as a tile with the name of the integration partner, their logo, a short summary of what the integration can do for your tech stack,

and a “Learn More” link, which opens a new window that includes additional information about the integration.



The dedicated page contains a summary of the partner company along with more information about the integration, including screenshots, tutorial videos, and pricing, as well as “Support Details” that will help you set up the integration.



factorE is a portfolio risk discovery tool that gives advisors the insights they need to have informed conversations with their clients about the risk in their respective portfolios. You can run a portfolio analysis on either the account or portfolio level to assess the risk held by their clients. After the risk is analyzed, you'll be able to use a factor-based scenario analysis to tell clients how their portfolio would have fared in big market events, like the great recession of 2008.

Integration Points:

- Account level data connection including account details, balances, and holdings.

▶ Screen Shots

▶ Videos

▶ Pricing

▶ Support Details

[Read Fact Sheet](#) →

Setting Up an Integration

Depending on what integration you want to set up, you can either make the connection on your own or work with our Integrations Team to complete the process.

Set-up Wizard

About 15 percent of our integrations are enabled with a user setup wizard. These can be identified by the blue "Add" button in the bottom right corner of the screen. (You might also see a green "Edit" button, which indicates the integration setup has already been completed.)

Home > Integration Center

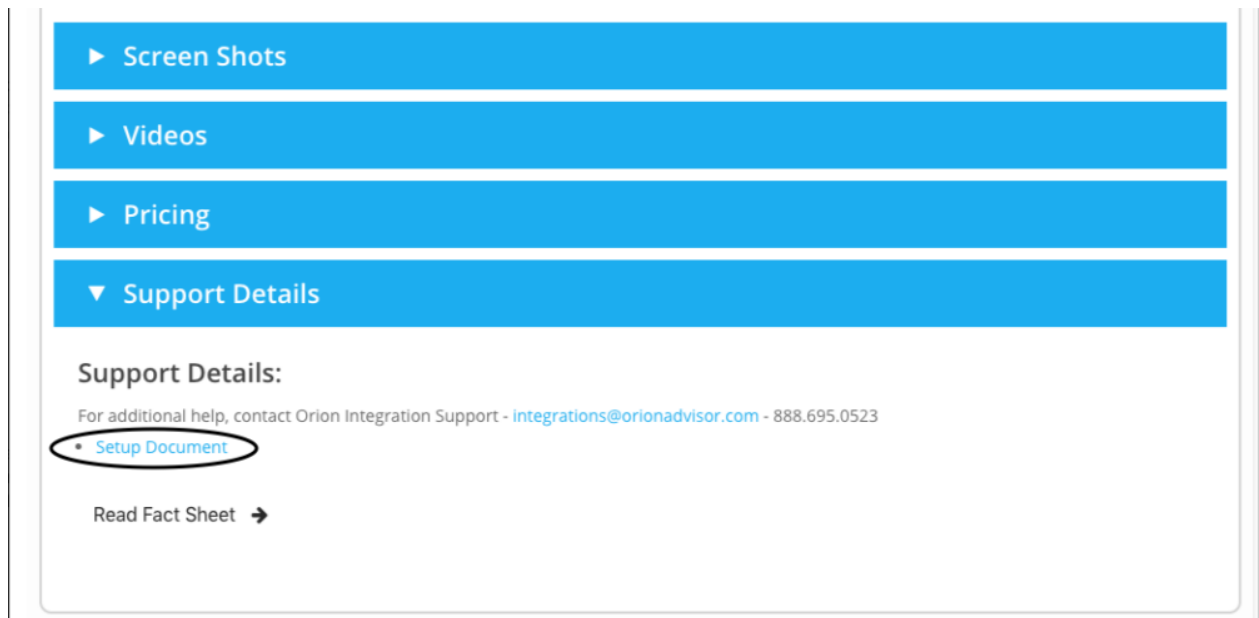
The screenshot displays the 'Integration Center' interface. At the top, there is a breadcrumb trail: 'Home > Integration Center'. Below this, there are six integration cards arranged in a 2x3 grid. Each card features a logo, a name, a brief description, a 'Learn more' link with an external icon, and a button. The top-right corner of each card has a diagonal banner indicating its status: 'FEATURED' for Advizr, Fidelity Wealthscape, Riskalyze, and Schwab; and 'NEW' for Benjamin. The 'Add' button on the Advizr card and the 'Add' button on the Schwab card are circled in black. The Riskalyze card has an 'Edit' button instead of an 'Add' button. The Benjamin card is highlighted with a green border.

Integration	Status	Action Button
Advizr	FEATURED	Add
Fidelity Wealthscape	FEATURED	Learn more
Riskalyze	FEATURED	Learn more / Edit
Schwab	FEATURED	Add
TD Ameritrade Veo One	FEATURED	Learn more
Benjamin	NEW	Learn more

For these integrations, simply click the blue “Add” button to open the setup wizard, You can then follow the on-screen instructions.

Support Details

The majority of our integrations will provide installation instructions or quick setup guides, such as the one shown below for [Hidden Levers](#).



Orion Integrations Team Setup

From time to time, you may encounter an integration that does not have a setup wizard or setup instructions. In such an instance, you will need to contact the Orion Integrations Team to complete the setup.

Need help building your tech stack by having an integration configured in Orion Connect? Contact the Orion Integrations Team via the online chat in Orion Connect. You can also email integrations@orionadvisor.com or call 888.695.0523.

Orion does not endorse any particular third-party product or service. Our clients should undertake their own assessments to determine whether these parties meet their business and due diligence requirements.

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