FUSE 2018 Award Winners and Integration Advancements



Over the last five years, the Orion FUSE conference has become synonymous with advancing points of integration between advisor technology companies.

Though in the past we've hosted FUSE among the snow-capped peaks in the ski-town of Park City, Utah, this year we heated things up a bit, calling on our integration partners from the wide-open waters and white sandy beaches of Miami Beach, Florida.

And while we were at it, dialed-up the stakes, changing the way participating fintech firms were awarded for their creativity — all for the benefit of our clients. In our first ever "Tech's Got Talent" contest, we asked fintech firms to team up with members of our advisory board and to go head-to-head, developing and coding (poolside, of course) their most disruptive and innovative integration ideas as part of a multi-round elimination process. The teams that would rise to the top would have the chance to present their ideas to a powerhouse panel of judges and a packed room of advisors on the main stage at our Ascent 2018 conference.

In this post, we'll cover the new features unveiled by the nine final-round integration partners and reveal all the FUSE 2018 award winners.

FUSE 2018 Integrations

Here's a rundown of the advisor technology partners who made it to the final round:

BlackRock

Integration:
BlackRock's development gives advisors a way to easily import and compare models through BlackRock's analyzer inside of Advisor Center. Through the integration, advisors can launch from Orion right into the analyzer, importing models to analyze, compare, and update. This tool will be free for advisors to use and was completely built at FUSE 2018.

Why It Matters:
In an ideal situation, advisors can use this tool to create a more streamlined proposal process for their clients.

How to Learn More:
BlackRock Advisor Center

CLS Investments

Integration:
CLS created *Investor Blueprint,* a tool built specifically for the financial services industry, and t matches personality type with practical guidance to help advisors build relationships with clients and prospects.

Why It Matters:
By identifying behaviors and likely responses to market conditions, *Investor Blueprint* can help advisors prepare to best communicate and work with various client types. It can also assist in creating different versions of Orion reports based on a personality type and market conditions.

How to Learn More:
CLS Investments

Dimensional Fund Advisors (DFA)

Integration:
DFA built an integration into their Model Center application. The process begins in Orion Eclipse™, where an advisor can push a model into Model Center. The imported model then goes through a model review process that leverages the human component of coaching to help evaluate and suggest changes to the model

based on research and peer comparison.

Why It Matters:
In addition to providing a human element not often found in technology solutions, any suggested changes can be sent to Orion for immediate, time-saving updates.

How to Learn More:
Dimensional Fund Advisors

Everplans

Integration:
Everplans developed a chatbot with text notifications for reminders and simple inquiries. The user's responses add the data directly to their Everplan.

Why It Matters:
Any new data added to an Everplan kicks off a notification to Orion that a client is interacting with the plan, and thus alerts an advisor that their client is actively thinking about that relationship and may need a personal follow-up.

How to Learn More:
Everplans

FinMason

Integration:
FinMason created a tool to mass analyze all portfolios in an Orion database to test against various stress testing scenarios, benchmarks, or Monte Carlo success criteria.

Why It Matters:
This tool, which could be embedded natively into Orion's compliance platform, will help advisors find and/or filter account data using specific search parameters to ensure each portfolio is in line with their stated objectives.

How to Learn More:
Finmason

InterGen Data

Integration:
Using statistical data on life events, imported demographic and personal details from sources, and AI machine learning, InterGen is able to predict the likelihood of events, the costs involved, and the impact of those events on a financial plan.

Why It Matters:
InterGen has integrated this development as an Amazon Alexa skill so it's easily accessible and simple to use. As shown by United Planners at FUSE 2018, it can be used to give a client a quick analysis and then connect them to an advisor.

How to Learn More:
InterGen Data

Investment POD

Integration:
Investment POD unveiled a Virtual Reality meeting space, which included an Orion report visual.

Why It Matters:
As Augmented and Virtual Reality continues to grow around us, it will necessarily make its way into the financial services industry as well. Investment POD has built a demonstration that allows advisors to see how they might one day be able to conduct a VR-only meeting with a client.

How to Learn More:
Investment POD

MoneyGuidePro (MGP)

Integration:
MoneyGuidePro focused on several enhancements, including building a data connection to use our API, adding client-level SSO, enabling saved reports inside of MGP to also be pushed to an Orion Client and allowing a refreshed Monte Carlo Score ("Probability of Success") to be displayed and reviewed from the Portfolio Audit.

Why It Matters:
Overall, these enhancement were made based on direct customer feedback and will make account access easier, streamlined and more secure.

How to Learn More:
MoneyGuidePro

Redtail

Integration:
Redtail's CEO, Brian McLaughlin, put in his own coding time to build Orion its own Slackbot, that allows advisors to initiate actions in Orion without leaving Slack's application. Its functionality includes commands to pull up notifications or pull results from notifications. In one fun example, advisors can type "Show me the Money" to see a client's balance, and set a Trade Block.

Why It Matters:
Using Brian's tool as a foundation, Orin can easily build simple actions into its existing functionality and embed it into our platform to give advisors new, intuitive ways to interact with portfolios.

How to Learn More:
Redtail

SaleMove

Integration:
SaleMove showcased an integration allowing Orion's advisors to use SaleMove's CoBrowse, screen-share and video chat features at no additional cost to more easily collaborate with clients in real-time.

Why It Matters:
SaleMove's integration also lets advisors use its full-service digital communication suite, built on Amazon Web Services technology and including artificial intelligence.

How to Learn More:
Read This Case Study

Schwab

Integration:
Schwab implemented digital account opening directly through the Orion Connect platform. Starting from Orion's New Account Center app, advisors can launch the Schwab Digital Account Opening experience and push relevant Orion data right into their custodial new account forms.

Why It Matters:
Everything—including signature—is handled digitally, and the Schwab account number immediately pushes back into Orion for accurate, instant householding.

How to Learn More:
Read the Press Release

And the Winners Are (drum roll, please) ….

Though all of our finalists presented excellent ideas at Ascent, our advisors helped us select this year's winners:

- **Best-in-Show (***combining votes from the People's Choice and Judges' Choice*)**:** SaleMove
- **People's Choice:** SaleMove
- **Judges' Choice:** MoneyGuidePro
- **Best Hackathon:** Redtail CRM
- **Best Newcomer:** InterGen Data

Beyond FUSE 2018

FUSE exists as a way to promote collaboration and integration between advisor technology companies so that our clients have access to the latest and greatest in technology innovation. If you're an Orion advisor, you'll be seeing these integration advancements roll out over the coming weeks and months. Beyond this event, we'll continue to work with our valued integration partners to build new enhancements that allow our advisors to innovate, disrupt and win in their own businesses!

Don't work with us yet? Click here to speak with our sales team to see how Orion's portfolio accounting solutions can support your firm.