

HiddenLevers + Orion | Strategies to Help Calm Client Fears



Rising Inflation, U.S. Housing Market, COVID-19 Vaccines, and Cryptocurrency. These are the headlines that your clients are being bombarded with everyday. And with every new headline, comes a new set of fears.

Now, more than ever, discussions around risk and real-time events are essential in calming client concerns.

Before the media captures your client's attention, being at the forefront of those concerns and having a response when clients ask the question, *"What if?"*, can empower you to have engaging, topical conversations that demonstrate the value you provide in all economic environments.

Are you prepared to address your clients ongoing concerns during these unprecedented times?

During this on-demand webinar, you'll hear Orion's own Clark Jeffries and Adam Palmer discuss actionable strategies that can help prevent clients from allowing fear to disrupt investment decisions.

Together, HiddenLevers and Orion provide you with tools to help reassure clients that they're properly invested to meet their financial goals—no matter what the future holds.

With the power to demonstrate the good, the bad, and the ugly market conditions through different scenario analysis, you'll be in a position to have successful conversations with clients and help to provide peace of mind.

In addition, we'll also showcase:

- How RIA's can provide transparency, make investing easy, and address client's concerns through a single connected wealth management experience
- An in-depth review of HiddenLever's capabilities, such as gauging risk tolerance, stress testing portfolios, and recommendation building to minimize risk
- How HiddenLevers and Orion come together to provide business intelligence, risk analysis, and economic research through a tech-enabled fiduciary framework
- A sneak peek at HiddenLevers' soon to be released new 3D Risk Profile to support your client conversations
- Exciting roadmap features designed to enhance the integration between HiddenLevers and Orion

And don't miss out on an exciting promotional offer for current Orion users!

HiddenLevers and Orion can help you be ahead of your client's fears and focus on helping them achieve their long-term financial goals. You can catch our on-demand webinar [here](#)!

Want to hear more how the HiddenLevers + Orion integration can help support your client needs? Contact Orion's experts today to demo our comprehensive wealth management platform.

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