



# Hit the Ground Running with Orion and Advizr: SSO and Asset Class Mapping

## **Financial Planning Software That Transforms the Client Experience**

By now, you've probably heard about Orion's acquisition of Advizr, an innovative financial planning and client experience technology platform. The integration, aimed at helping our advisors deliver a next-generation client experience that connects progress toward goals with investment performance, will be rolled out in phases.

But we want our advisors to have the financial planning solutions they need be able to begin transforming the client experience right away. That's why we're starting straight out of the gate with a single sign-on (SSO) integration, asset class mappings, and account type mappings (based on Orion's defaults) from Orion to Advizr.

## **Single Sign-On**

The SSO works at both the advisor and client levels, allowing all stakeholders to engage with financial plans faster. From the Orion Connect client portal, advisors and clients can access the Advizr client portal to see performance overview, cash flow analysis, Monte Carlo projections, and more.

Advisors will also be able to access the SSO at the Advisor level with an Advizr application, as well as launch Advizr from Portfolio Audit and the New Accounts center.

## **Asset Class Mappings**

Using Morningstar data, tickers and market values for investable assets in Orion automatically sync to Advizr and map to the JP Morgan Capital Market Assumptions. Advisors who do not use Morningstar will have the ability to manually map asset classes to the appropriate capital market assumptions. Note that asset classes not mapped to the JP Morgan Capital Market Assumptions will not be considered in Monte Carlo simulations.

Additionally, the financial plans you create for clients factor the actual holdings in a model—not the proposed holdings—as Monte Carlo simulations are performed and recommendations are made.

## **The Big Picture**

With streamlined integrations available from the outset, advisors can get started creating financial plans faster, ultimately delivering better outcomes for their clients and for themselves. According to Fidelity research, HNW investors who held to their financial plan grew their assets by 110% compared with those who didn't — and advisors who provide advice-planning services to their clients have higher AUM and compensation than their peers who do not.

The SSO and Asset Class Mapping integrations are just the beginning. We're working toward a complete, seamless integration between Orion and Advizr, empowering advisors to connect and collaborate with their clients in forward-thinking ways, not only meeting their expectations but exceeding them.

To learn more about what's coming next from Orion and Advizr, watch our on-demand webinar now.

Ready to get started right away? Sign up here for access to Advizr.

Not working with Orion yet? We'd love to start a conversation and show you what Orion can do to simplify your business. Let us know here and we'll give you a call right away!

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