

How Orion Communities Gives Advisors More Personalized Investment Choices



If your firm works with one hundred clients, you probably work with one hundred varying degrees of risk, financial literacy, and client objectives.

The difficulty of accommodating those unique client needs with a handful of firm-created models only grows as advisory firms grow larger, as well.

Resulting from the need for scalable and effective investment options, model marketplaces have emerged as a disruptive force because of their ability to offer investing flexibility, choice, and personalization while still allowing advisors to retain their fiduciary oversight and trading discretion.

That's why we've created Orion Communities, an investment model marketplace where advisors can discover and subscribe to personalized options from vetted and experienced asset managers with just a click.

In this blog, we'll show you how Orion Communities empowers you to enhance the investment management services you offer to clients.

How To Easily Navigate Orion Communities

Orion Communities offers access to models from brand, boutique, and emerging money managers across three asset categories: fixed income, equities, and alternatives.

After selecting an asset category, Orion Communities subscribers can compare models on multiple criteria, like manager, management style, model fee, minimum investment amount, risk score, and more.

Once you've found a model that matches your investment philosophy and client needs, subscribing is as easy as a click. The model then loads immediately into your Orion model list, where it can be accessed via Orion's trading platforms.

When a model manager makes updates to their model, you can choose to accept or deny those updates, allowing you to retain full trading discretion across your client accounts.

Many of the models offered in Orion Communities are at no cost (excluding a small platform fee), but you should review the supplied materials from each strategist to understand their specific terms before you subscribe.

How Orion Communities Enhances Investment Management for RIAs

We understand that selecting a model portfolio for your clients is more complicated than a single click. It's important to perform your due diligence to find a model that is most suitable for your clients' unique investment goals and needs.

We've made this process a bit easier for you with extensive investment research performed on strategists.

In addition to due diligence features, here's how Orion Communities further benefits your investment management offering:

- Build more personalized portfolios by creating blended models that combine your in-house strategies with the third-party investment options you can find in Orion Communities.
- Spend more time growing relationships with your clients and less time rebalancing should you choose to auto-accept trades.
- Retain trading authority by approving any strategist model changes before they're implemented in client accounts. No one understands your clients' goals and needs better than you, and Orion Communities allows

you to maintain full trading control.

By using Orion Communities to expand the investment solutions you offer to clients, your firm can save time on operations, while delivering a more personalized investment experience.

Who's Available on Orion Communities

Orion Communities features models provided by some of the industry's most well-known asset managers and institutional strategists, including:

- AAMA
- Appleton
- American Funds
- Beaumont Capital Management
- Cardinal Capital
- Chilton Capital
- Clark Capital
- CLS Investments
- COHO Partners
- Cougar
- Diamond Hill
- ETF Global LLC
- Franklin Templeton
- Horizon Investments
- Hotchkis and Wiley
- JAForlines
- Lazard
- Main Management
- Meeder Advisory Services
- Ocean Park Asset Management
- Orion Portfolio Solutions
- Polen
- River Road
- Russell Investments
- Sandhill
- Sterling Capital

- Symmetry
- Toews Corporation
- Vanguard
- W.E. Donoghue

Ready to see how Orion Communities can help you personalize client portfolios more easily—and at scale? [Click here](#) to register for our upcoming webinar to learn more!

Can't wait to get started? Reach out to sme-orioncommunities@orion.com to access Orion Communities.

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