

# How Orion Stacks Up to the Competition



Whenever you add advisor technology to your firm, you want to know that you're doing what's best for the long-term success of your business.

One way to annually gauge the industry perception of the technology you use is by reviewing the T3 Technology Trends survey, released each year during the T3 Advisor Conference by Joel Bruckenstein and Bob Veres.

And we're excited to say that the T3 2018 Tech Trends survey shows that Orion not only stacks up well to the competition, we regularly surpass them.

Check out the infographic below for more details about why Orion is the right choice to be your portfolio management technology.



## HOW ORION STACKS UP TO THE COMPETITION

When choosing technology partners to empower your advisory business, it's important to find one that is well-positioned to support your unique environment. That's especially true with portfolio management tools – technology that directly affects your daily workflows and the experience delivered to investors. Advisors should seek to find the right balance between partner capability, focus, and support.

T3 Technology Hub's 2018 Tech Trends survey has shed some light on the state of the industry. How does Orion stack up? See for yourself:



### A LEADER AMONGST LEADERS

#### User Experience Ratings

**7.62%**

AVERAGE  
(OUT OF 10)

Orion received the highest user experience rating among major players in the market (firms with market share above 2%), demonstrating a unique ability to balance high-scale tech capability with robust advisor service and support.

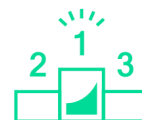
### WHAT'S TRENDING IN THE MARKETPLACE

#### Market Interest Gauge

**213**

RESPONDENTS  
1<sup>ST</sup> OVERALL

More than 200 survey respondents indicated they are considering adding Orion's portfolio management tools to their business, nearly double the number of advisors considering the second-runner: Envestnet/Tamarac.



### TECHNOLOGY THAT'S TRUSTED BY MANY

#### Portfolio Management Tool Market Share

**9.4%**

MARKET  
SHARE

**4<sup>th</sup>**

PLACE  
RANKING

Orion displays strong and sustained growth, ranking 4<sup>th</sup> in total market share.

Ready to see what Orion can do for your business? We'd love to start a conversation. Let us know here and we'll give you a call right away!

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