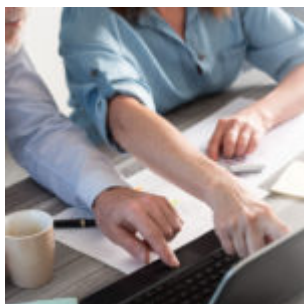


# How to Build Portfolios in Orion Communities



A community can be defined as a group sharing common attitudes, interests, and goals.

When we decided to name our model sharing platform *Orion Communities*, we envisioned it would become a place where advisors could easily find model portfolios that aligned with their clients' best interests and goals, supporting their fiduciary responsibility.

Communities offers two types of users: **Subscribers**, who can find and subscribe to models on the platform, and **Strategists**, who offer models for subscription.

While we are excited to launch Communities with model portfolios from amazing, recognized industry-leaders like BlackRock, Russell Investments, and CLS Investments, a truly differentiating element of the platform is the ability for all of our advisors to share their own, custom models. After all, the more choice that is available on the platform, the easier it becomes to find a new strategy and offer more value to your clients.

In today's post, we'll look at how simple it is start offering your model portfolios for subscription by other advisors, by becoming a **Strategist** on Orion Communities.

## Build Your Marketing Page

Strategists can build and market any number of models within Communities. Becoming a Strategist can help you grow your business by charging a fee to Subscribers for the use of those models.

**Orion User Tip:** *Becoming a Strategist is simple. During your Eclipse™ setup, you'll be asked if you want to become a Strategist as part of the process. Our Communities SME team will send you the required Terms of Use to complete set up.*

*If you're not using Eclipse™ but do want to offer models as a Strategist, you can request a demo, or attend a webinar if you're not familiar with Eclipse™ yet.*

But before we walk through building a model in Communities, we'll first look at setting up your marketing page. The marketing page is where Subscribers will learn more about you and your available strategies.



Your marketing page will allow you to perform the following:

- Set your firm's branding, including preferred font and logo
- Add your team's users so only authorized staff members can manage models in Communities
- Add commentary for Subscribers to read more information about what you offer
- Link URLs to your website or other relevant information about your strategies
- Enter your sales and support information so Subscribers know how to get in touch with you
- Add your legal agreement detailing any terms and conditions Subscribers need to be aware of before they subscribe to your models; you are responsible for managing your relationships with Subscribers and all necessary legal requirements
- Add a promotional messaging to let Subscribers know about webinars or other educational resources that highlighting your strategies

# Build Your Models

Once you've set up your marketing page, it's time to advance to the reason you became a Strategist in the first place: Offering your models for subscription.

After you log into the Communities app in Orion Connect, click Models on the left-hand navigation to begin. You'll then be presented with two options for adding a new model:

- *Option 1 - Model Import:*

Download the formatted spreadsheet, enter your model details in the required columns, and upload it again to create multiple models at once.



- *Option 2 - Manual Creation:*

Use this option to enter each model separately. The required information includes Model Name, Risk Tolerances, Minimum Portfolio Amount, Advisor Fee, and Weighted Average Net Expense. You'll also enter tickers for each security, and your allocation must always equal 100 percent.




Once your models are saved, go to the Marketing Editor section along the top navigation bar to add additional resources, like commentary, advertising, and educational content for each model just as you did for yourself on the Strategist marketing page.

Once you've uploaded all relevant resources, you're ready for Subscribers. Contact the Orion Super Admin **here** to convert your Strategist Tile from *Not Active* to *Active* so Subscribers can find and select you and your models.

## How Subscribers Can Find Your Models

Your Strategist tile is viewable by anyone using Communities. If you are also an Eclipse™ subscriber, you can preview how others will see your information by navigating to your Strategist tile in the Subscription menu.

 Click more details to see how the rest of your information appears for users. Here, you'll see all the information you previously loaded through the Marketing Editor and setup stage.

If an advisor wants your model, they will click Subscribe on your Strategist tile and then accept your terms and conditions.

## Reports for Strategists

Information is power and we've made sure to include reports that provide Strategists with up-to-date data on your models. Here are two specific reports you'll be able to view in your Strategist Dashboard:

- AUM - See total Assets Under Management across all the models you offer in Communities.
- Account overview - See the number of accounts invested in your models.

For each report, you can view your statistics by:

- Firm - See which firms have subscribed to your models and view allocation values and percentages
- Advisor - See how allocation values and percentages break out by individual advisors
- Model - Identify which models are used and the value of allocations across all offerings

If you're an Eclipse™ user, you can subscribe to models in Communities at any time. However, you do not have to be an Eclipse™ user to be a Strategist. Contact our Communities SME team hereto begin to share your expertise as a Strategist.

**Not an Eclipse™ user?** *Sign up for an Eclipse™ webinar, offered on Tuesdays and Thursdays, and learn more about the full capabilities of our customizable trading and rebalancing app.*

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