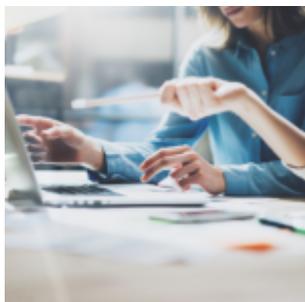


# How to Build the Technology Stack of Your Dreams



You often hear consultants talk about building the technology stack of your dreams. Usually building that stack requires advisors to choose from a long list of technology solutions across many different categories.

When there are so many options to choose from, it can be tempting for independent advisors to settle for a one-size-fits-all solution.

But too often, that *one-size-fits-all* approach ends up being a *one-size-fits-none*.

The better approach is to choose technology partners based on their ability to work together to streamline your operational tasks. You don't have to have run an advisory firm for twenty years to understand how integration is more than a nice-to-have—it's a must-have for any advisor who wants to efficiently grow their firm.

Since Orion started in 1999 we've been focused on creating an experience for advisors built on integration with like-minded technology partners so advisors can do business their way.

When you're thinking about building the dream tech stack, you need to consider how each technology partner you choose supports the way you uniquely work.

## Orion's Innovative History

As you consider advisor technology options for your firm, look at the background of how they embrace integration. They need to do more than give it lip service.

At Orion, we offer integrations with more than 100 partners in financial services. You might think that's a lot, and it is.

We make it easy for partners to build into our platform with an Open API. In simple terms, that means we offer development resources that make it simple for fintech companies to integrate with us.

But we also do more than simply add integrations; we put our talk into action with the FUSE hack-a-thon conference that we started in 2014.

Each year, we bring together the leading tech firms supporting independent advisors and make it easier for them to build integrations with each other and with Orion.

We didn't create FUSE to benefit ourselves. We did it because what's best for advisors is the ability to choose the technology they want, no matter where it's from, and when their choices can interact together more comprehensively, advisors win.

The proof is in how many enhancements have released to advisors; more than 40 have launched in total.

## **Integrations Allow You to Do Business Your Way**

Integrated services give you the ability to operate your business with as much independence as the title "independent RIA" indicates.

Each advisory firm has a unique value proposition. The efficiency with which you can support clients and continue to offer your value at scale is often dependent on the technology platforms you choose.

When your technology doesn't work the way you want, it's difficult to enjoy your work. Let's look at just one simple example.

If you're a firm that prioritizes financial planning, you need your financial plans to be accessible to clients and front-and-center in how they understand the valuable work you provide.

In this situation, you probably want your client to see their financial plan, and the progress they're making toward it, whenever they log into your client portal.

If you make the wrong technology choices, this type of interaction can become difficult. But Orion makes it simple. We offer an integration with every major financial planning system, and most can be embedded within your Orion Client Portal for easy anytime access.

## **Integration Partners**

With more than 100 integrations, you can throw a dart at a map of advisor technology companies and probably find one that integrates with Orion.

We support our advisors with integrations in every part of the dream tech stack:

- CRM
- Financial Planning
- Trading
- Risk Management
- Investment Management
- Personal Financial Management
- Document Management and Processing
- Compliance
- Data Analytics
- Client Experience
- & More

See complete details about the integration partners we collaborate with, and how our integration framework empowers advisor productivity, please visit our [Integrations page](#).

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