

How to Stand Out in the Crowd: Leveraging Orion to Offer a Unique Level of Service



In an increasingly noisy, commoditized industry, financial advisors looking to grow their book of business need to find a way to stand out.

One way to do that is by making technology your differentiator.

As financial tech continues to evolve beyond table stakes reporting, billing, and trading, advisors should be calling on their tech stack to help them deliver a unique level of service—one that builds client loyalty and inspires referral business.

To help advisors cut through the noise, technology should:

Empower Efficiency

The more efficient an advisor becomes, the more time he or she has to spend nurturing client relationships. Your advisor tech should enable you to take quick action on necessary daily tasks, surface critical information seamlessly, and help reduce the burden of tedious, time-consuming compliance tasks.

Improve Client Experience

More than ever, client experience is a crucial component of the holistic wealth management journey. Investors are used to streamlined digital capabilities thanks to delivery giants like Amazon and Netflix; advisors who can provide the same kind of financial management experience via a robust and intuitive client portal have a distinct advantage.

Help Generate Tax Alpha

One way to deliver exceptional service is to help your clients keep more of the money they earn. Cutting-edge trading tools that make it easy for you to capitalize on tax-loss harvesting opportunities while accounting for personal client preferences, like ESG investing, help you create real value for your clients.

In this on-demand webinar, How to Stand Out in the Crowd: Offer a Unique Level of Service with Orion, experts Sean Hollingshead and Ashley Heinzman explore Orion's latest innovations and capabilities designed to help our advisors set themselves apart.

Watch Now

2247-OAT-8/10/2021