

In These Uncertain Times, Be Certain About Your Data



The COVID-19 health crisis continues to cause massive disruptions across not only the United States, but our world as a whole. Entire countries—India, Italy, and South Africa—are on lockdown. And as health concerns increase, so do the possibilities for other risks that could affect your advisory firm.

Such as the timely and accurate delivery of your client data. At Orion, we believe access to up-to-the-minute data is critical for advisory firms to run effectively. And even as we've moved our entire organization to remote work as a result of COVID-19, our data reconciliation team has been able to maintain its service performance during the crisis.

When evaluating technology vendors, one of the most important questions advisory firms can ask is this: *Will my data be accessible when I need it?*

Orion's domestic operating model eliminates the risks exposed by outsourcing to another entity or foreign jurisdiction. Here are a few highlights from start of day processing over the last two weeks:

- Despite later-than-average recon file delivery times by the big four custodians, Orion has completed reconciliation within SLA targets during this tumultuous market volatility
- The average time to complete reconciliation across the big four custodians was reduced by 29% during the first week that our New York based Data Analysts worked from home, as compared to the prior period
- Reconciled position, cash, and custodial cost basis have been consistently available to Eclipse users prior to the market open
- Eclipse is hosted on Amazon Web Services, eliminating latency from

significantly increased trade volume and intraday analytics

- Client database reconciliation is not dependent on completion of all custodians and clients as it is with other vendors
- Reconciliation status is updated in real time

Eric Clarke, CEO of Orion Advisor Solutions, weighs in on the importance of knowing exactly where your data is and how it's being handled. Read more here.

During these unprecedented times, you don't need one more thing to feel uncertain about. Click here to talk to an Orion team member today about our data services, including the 3.6 million accounts we reconcile domestically every day.

0794-OAS-3/30/2020