

Differentiating Advisor Value Through Integrated Technology



Founded in 1983 by Ron Carson, Carson Wealth has grown to become a Barron's Hall of Fame advisory firm with offices spread across the United States. Now, Carson Group is an entire ecosystem dedicated to helping advisors better serve their clients and grow their firm. Advisors can unleash their firm's full potential either through Carson Coaching, one of the largest advisor coaching programs in the nation, or by joining Carson Partners to receive industry leading marketing, technology, compliance, investments, succession planning and mergers & acquisition support.

They provide their over 300 partner advisors with a tech stack that not only increases operational efficiency, but wows clients in the process so advisors can spend their valuable time focusing on their business and client relationships.

In the third installment of our Work Smarter webinar series, we spoke with Lantz Hunt, Chief Operations Officer of Carson Group's RIA. Lantz brings over 23 years of experience in the financial services industry to his role, having held various management roles including trading, compliance and operations. He shared his thoughts on making an impression on the client experience by first focusing on the processes and systems behind the curtain.

Have the right technology partners behind the scenes

As the trend to provide better client experiences continues, advisor's dependency on technology increases. Carson Group thinks of Orion Advisor Technology as the engine to the machine — a system that helps advisors simplify and scale their

back-office operations through a robust offering of tools and services.

Part of that Orion engine is the flexible open API framework, which provides financial advisors with real-time data on clients. With the API's available through Orion and their custodian, Carson Group was enabled to enhance their client experience by adding a new online account opening process to help streamline client onboarding, which has been key during the pandemic when in-person meetings weren't feasible.

Get up to speed on technology roadmaps

Having the right technology partners in place is great but having insight into their roadmap is crucial. When working with technology and custodial partners, advisors need to convey how they want to use their system. For the Carson Group, this not only includes what their advisors and team want out of the technology experience, but also knowing what their clients want. Advisors need to ask their clients "What experiences do you like and what experiences don't you like?" Then, funnel that feedback to their technology partners with the goal in mind of always making it a better user experience — for both the advisor and their clients.

Technology adoption is a necessity to keep an advisor's practice moving forward. Knowing what's on the product roadmap can help firms to plan ahead and stay aligned on their strategic objectives. It also provides them an opportunity to become involved in the development and testing process of user enhancements. This helps drive advisor success by improving productivity, creating efficiencies, and deepening client relationships.

Learn more about how you can efficiently streamline your tech stack and enhance your client experience.



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