

Integration Now Available With iCapital Network



Orion's platform is always expanding to create more connections for our advisors, and in this month's Software Update we are excited to let you know about a brand-new integration.

Orion is now integrated with iCapital Network, a financial technology platform that provides alternative investment solutions for RIAs, broker-dealers, private banks, and family offices.

Here's what you need to know about how this new integration will work in Orion.

Integration Details

- An iCapital link will be available in Orion Connect and provide access through a Single-Sign On (SSO) feature.
- SSO is available for any RIA using Orion to access the iCapital main site and registration link.
- An RIA not registered with iCapital will still need to manually fill out the registration information before gaining access to the iCapital platform.
- If an RIA is already registered with iCapital, the SSO will give them direct access to their platform site.

More About iCapital Network

iCapital Network's financial technology platform provides modular alternative investments solutions for registered investment advisors, broker-dealers, private banks and family offices.

iCapital Network's online portal offers a curated menu of private equity, private credit, venture capital, real estate and hedge funds, along with extensive due

diligence support, an automated subscription process and integration with a wide range of custodians and reporting packages.

The firm's configurable technology and specialized suite of services is also used by asset managers and financial institutions to streamline and automate their private fund operational infrastructure.

As of December 31, 2017, iCapital serviced approximately \$5.2 billion in platform assets including all iCapital entities and their collective assets under management, assets under administration and other fee earning assets.

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