It’s All About Presentation: Improve Yours with Orion and Asset-Map

As a financial advisor, your job is to provide value for your clients. You already know that.

It’s likely — and understandable — that you think of that value in terms of finances: improving portfolio performance through smart investing, generating tax alpha, increasing overall market value, etc.

But what about adding meaning and value to your actual client interactions? Telling a client that their portfolio is performing incredibly well should be a positive experience. But the *way* you tell them makes a big difference. Black-and-white spreadsheets, or reports filled with industry jargon, aren’t going to resonate with people who live largely outside of the financial universe.

In short, it’s all about presentation.

At Orion, we’re always looking for ways that our technology can give you the resources you need to strengthen your client relationships. That’s why, in 2018, we partnered with Asset-Map, a visualization tool that allows advisors to map, organize, and display client assets, liabilities, cash flows, and future financial projections all on a single screen.

Being able to see traditionally dry financial information displayed in a comprehensive, visually appealing way empowers meaningful conversations between clients and advisors. Your clients typically don’t have the financial industry knowledge that you possess as an advisor. So they may not always understand what’s being presented to them, or even know the right questions to ask.

But a clearly illustrated financial picture gives clients the confidence to become active participants in their portfolios. It also reinforces their trust in you as an advisor.

Now, we've taken our collaboration with Asset-Map a step further, enabling you to demonstrate maximum value for your clients.

Key enhancements included in this integration allow you to:

- Seamlessly access and edit your clients' Asset-Maps from directly within the Orion Insight Dashboard
- Pull Orion household and account-level performance data right into Asset-Map, and access that information without logging into Orion separately
- Add Asset-Map features like Overview, Reports, Key Financial Figures, and Household Members as editable tiles to client presentations
- View Target-Maps — visual guides that give clients a quick, comprehensive picture of how they are advancing toward their goals — from within Orion Insight

These updates not only save advisors time on the back end, but they also make it easier to have useful conversations with clients about priorities and next steps.

Want to learn more? Current Orion users, contact integrations@orionadvisor.com or 888.695.0523.

If you're not working with Orion yet, we'd love to start a conversation about how we can help you strengthen your client relationships. Contact us today.

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