

It's Time to Start Your Day: Is Your Data Ready?



Imagine this scenario: a concrete finisher shows up early in the morning to a job site, intending to lay concrete for a new building. The concrete is the building's foundation; in order for any additional work to be done, the concrete must be laid, finished, and completely dried.

But when the finisher arrives, he has no concrete to work with. His order is delayed several hours, meaning the entire construction project is also delayed. That costs the company who contracted the project money in lost labor, and also causes frustration among the construction workers.

Like the building's concrete, data is your firm's foundation. Without it, you can't make informed decisions, execute trades efficiently, create reports, or effectively do your job.

But if your tech provider shuts their system down overnight, or has issues with their data reconciliation in the morning, you'll be stuck waiting to start your day, missing potential trade opportunities and possibly keeping your clients waiting for critical portfolio information.

What's more, when your data finally is ready, you'll have to spend additional time playing catch-up instead of doing other things, like engaging with your clients or looking for new business opportunities.

At Orion, we think that's unacceptable.

Not only does our data services staff start at 4 a.m. and continue working until 8 p.m., including a Saturday shift, but we also keep our system running through the night. That's so we can be sure we're providing you and your clients with the

most accurate, up-to-date portfolio data, exactly when you need it.

Here's how we do it.

We reconcile over 3.6 million accounts daily, right here in the United States, with a recon process that's SSAE-18 Type II audited by an outside firm. You can view your daily reconciliation status in one central location, aggregating data feeds from over 1,500 financial institutions.

But that's not all. You don't just need data. You need to be confident in it. That's why we run comprehensive audits on a daily, weekly, and monthly basis: so you can be sure of your data's integrity when it comes time to actually use it.

And when you do put your data into action, Orion makes that effortless by centralizing all new accounts in a single location, allowing you to set up, view, and analyze new client data quickly and easily.

Don't just take our word for it; listen to our advisors. In a TechValidate survey of 464 Orion advisors, 76% of surveyed clients reported completing their data aggregation/reconciliation tasks at least 25%-35% faster with Orion.

That's more time to focus on growth, client relationships, and all the other tasks that go into running a successful advisory firm.

Interested? Getting started is easy: we provide up to 50 free hours of historical data conversion as part of our standard service offering.

Show up to work knowing your data is there waiting for you. To learn more about Orion's robust data services, check out our infographic [here](#).

1156-OAS-11/11/2019