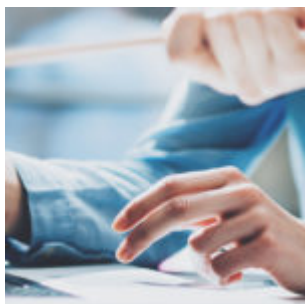


New Ways to Engage Clients with Portfolio Updates

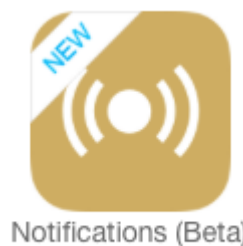


For a lot of people, texting has taken over as the main mode of communication in their daily lives. Anyone under thirty can attest that when you're using your smartphone to talk to another person, nine times out of ten it's done through text instead of a phone call.

Texting has become so important to us, that we feel it should be just as important a piece of the advisor-client relationship. That's why we've developed the ability for you to enable text updates with your clients for checking their portfolio information and scheduling meetings with you.

Set Up

When you log into Orion Connect, you'll now see a **Notifications** app with the Beta tag applied. (If you don't see it, call up or email your Advisor Success Advocate to have the app enabled for you.)



Once you're in the Notifications app, you'll have two options on the left-side menu: **My Subscriptions** and **Client SMS Settings**.

My Subscriptions allows you to set up your own text alerts. We won't cover that in this week's blog, but keep your eyes open for it to appear as a Tech Tip in one of our Orion Weekly videos.

For now, click on Client SMS Settings. On this page, you'll define the client

texting experience.

The screenshot shows the Orion Client SMS Settings page. The top navigation bar includes the Orion logo, a search bar, and links to Sales_Main, Chat (beta), Notifications, Assist Me, and a user profile for Joe Leyboldt. The left sidebar contains links to SETUP, My Subscriptions, and Client SMS Settings (which is highlighted). The main content area is titled 'Client SMS Settings' and has an 'Actions' dropdown. It is divided into three sections: 'Allow', 'Disclosures', and 'SMS'. The 'Allow' section has five toggle switches, all of which are turned on: 'Allow Advisor Contact', 'Allow Balances', 'Allow Meetings', 'Allow Performance', and 'Allow RMD'. Below these is a 'Meet Verbiage' field with a text box containing a message and a Calendly link. The 'Disclosures' section has two text boxes: 'Performance Disclosure' with the text '*past performance does not indicate future performance' and 'Terms and Conditions' with the text 'Use this at your own risk!'. The 'SMS' section has a 'Welcome Message' field with the text 'You are registered!'.

ORION

looking for something?

Sales_Main Chat (beta) Notifications Assist Me Joe Leyboldt

SETUP My Subscriptions Client SMS Settings

Home Client SMS Settings Actions

Allow

Allow Advisor Contact ☒

Allow Balances ☒

Allow Meetings ☒

Allow Performance ☒

Allow RMD ☒

Meet Verbiage

Disclosures

Performance Disclosure

Terms and Conditions

SMS

Welcome Message

Choose which data you'd like clients to receive in their texts. You can allow clients to request balance information, performance, required minimum distributions, and meetings with you.

Notifications takes the best parts of the Client Portal and puts them inside a text.

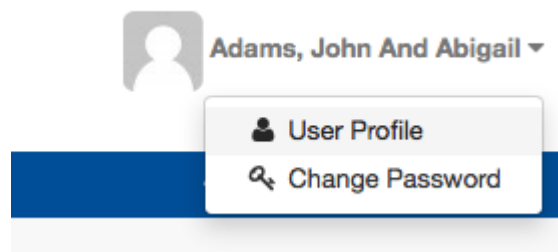
The customization doesn't stop there, though. You can set a short performance disclosure to send along with texts containing performance returns. Remember, it's a text, so "short" is what you're working with here. One-hundred and forty characters and under is preferred.

Once a client registers, you can also set up an automatic welcome message.

How Your Clients Get Set

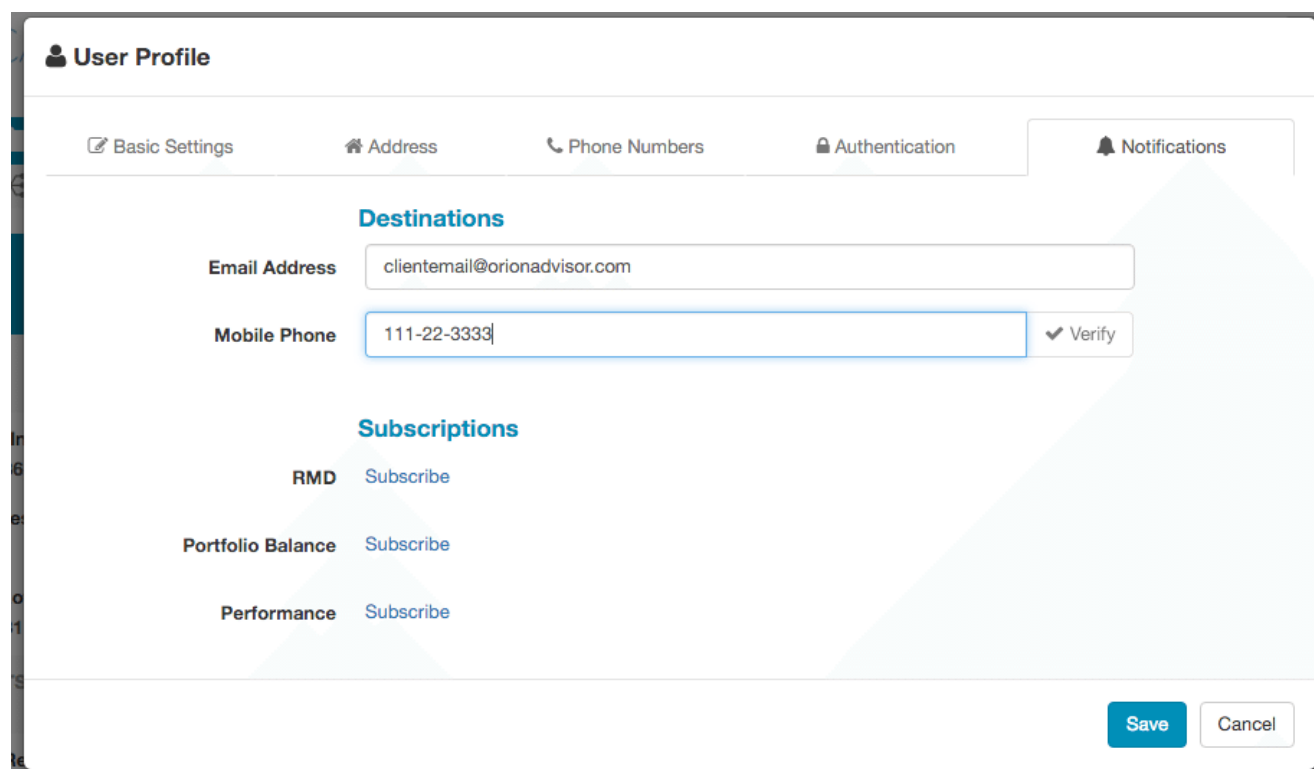
Your clients sign up for texts just as easily as you enable the ability for them.

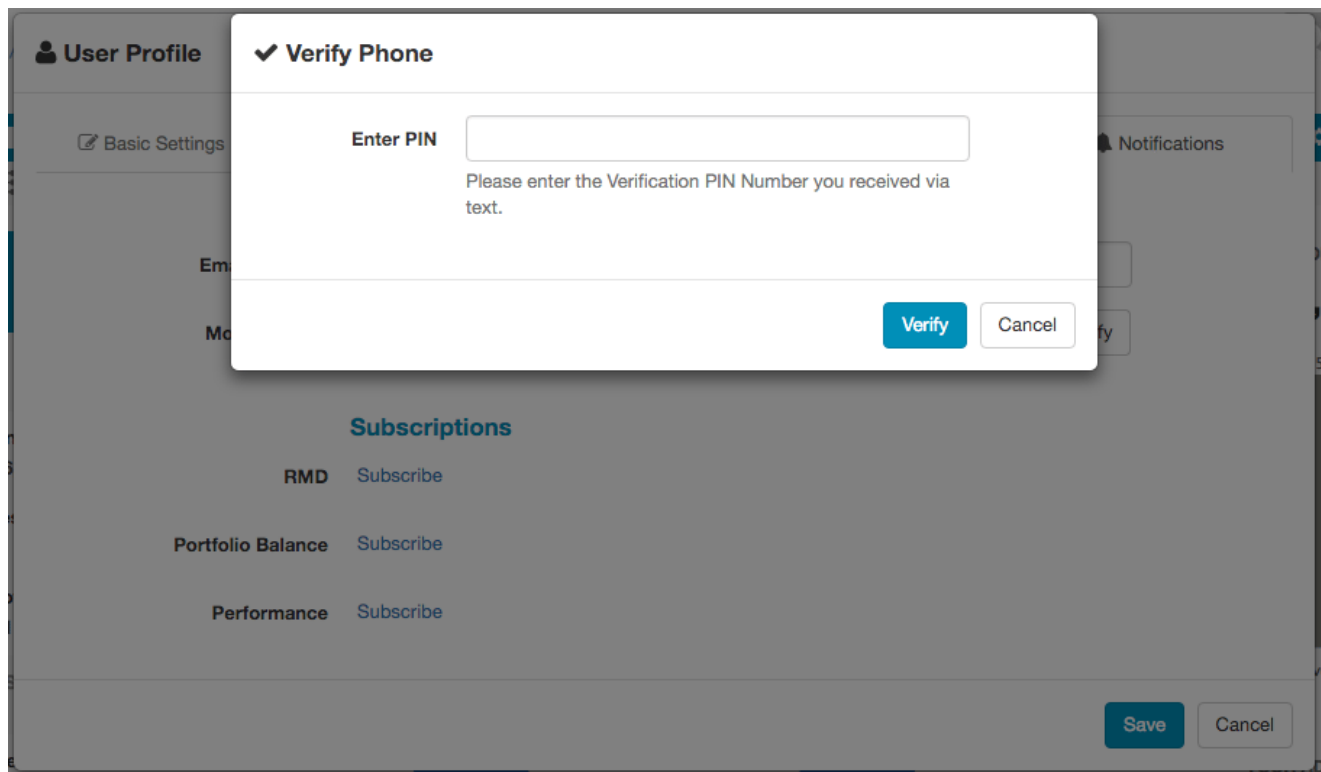
Here's how.



Once your clients log into the Orion Client Portal, they'll click on their user name in the top right and then User Profile.

From there, clients click on the Notifications tab, enter their phone number, and then confirm their number with a unique PIN. The client will receive a welcome message telling them the codes to text to receive their updates, based on the settings you chose for what you want them to receive.

A screenshot of the "User Profile" form in the Orion Client Portal. The form has a header "User Profile" with a person icon. Below the header are five tabs: "Basic Settings", "Address", "Phone Numbers", "Authentication", and "Notifications". The "Notifications" tab is selected. The form is divided into two sections: "Destinations" and "Subscriptions". In the "Destinations" section, there are two fields: "Email Address" with the value "clientemail@orionadvisor.com" and "Mobile Phone" with the value "111-22-3333". A "Verify" button with a checkmark icon is next to the "Mobile Phone" field. In the "Subscriptions" section, there are three rows: "RMD" with a "Subscribe" button, "Portfolio Balance" with a "Subscribe" button, and "Performance" with a "Subscribe" button. At the bottom right of the form are "Save" and "Cancel" buttons.



How It Works for Clients

After a client chooses to join your text update club, they'll receive some additional instructions telling them the short codes they need to get their on-demand updates.

Here's the full list of codes they can use, depending on which you choose to enable:

BAL = Portfolio Balance

PERF = Performance

ADV = Advisor Contact Info

RMD = Required Min. Distribution

MEET = Schedule a meeting

When a client texts one of these codes back to the number that welcomes them to Notifications, they'll receive back that information, like so:

But Notifications doesn't stop there. Your clients can also set up **Subscriptions**,

so they don't have to remember to ask for updates.

Back on the Notifications tab under User Profile, clients can click "Subscribe" on the options you've allowed. From there, they can choose to receive an automatic update, whenever they want.

And now you've got all the information you need to get started with the new Notifications app and texting alerts in Orion Connect.

If you have any questions, please contact your Advisor Success Advocate.