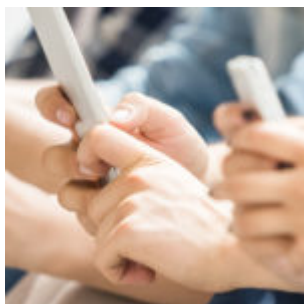


Open TD Ameritrade Institutional Accounts on Orion in Minutes with New Integration



Orion Advisor Services, LLC (“Orion”), the premier portfolio management solution provider for registered investment advisors, today announces a significant upgrade to its account-opening experience for Orion users who custody with TD Ameritrade Institutional, a leading provider of comprehensive brokerage and custody services, eliminating hours or days of manual data entry.

Integrating with the API of the TD Ameritrade Institutional Veo Account Opening Wizard, advisors on the Orion platform can swiftly populate new account forms for TD Ameritrade. This potent tool captures new account form data for use in the Orion platform, creating a faster account opening process and vastly reducing the likelihood of NIGO errors from repetitive, manual re-entry.

Using the Veo Account Opening Wizard, an advisor can obtain a new TD Ameritrade Institutional account number and complete the setup process without sorting through reams of paperwork. The wizard’s file fee drop-off feature allows advisors to process fee information more quickly, propagating it to more advisors. In addition, the integration provides enhanced service alerts to Orion users, giving them advance notice from TD Ameritrade Institutional about client opening activities.

“Advisors on the Orion platform will reap the rewards of Orion’s commitment to open API architecture,” said Bob Mahoney, director, technology solutions at TD Ameritrade Institutional. “The Veo Account Opening Wizard creates a wholly digital and frictionless onboarding experience, and we’re excited to bring this innovation to Orion users.”

Orion's integration with TD Ameritrade Institutional is the latest digital account open enhancement for Orion clients, showing Orion's continued commitment to finding new ways to reduce inefficiencies for users.

"Creating a new account can feel like a throwback to the 20th century. Without the benefit of digital innovation, it can be an arduous, time-consuming undertaking for advisors," said Eric Clarke, founder and CEO of Orion. "Our relationship with TD Ameritrade Institutional has allowed us to bring an incredible time-saver to our platform, freeing our users to make better use of their time than redundant data entry."