

Orion Acquires HiddenLevers to Create a True End-to-End Wealthtech Solution



When Orion pushes the boundaries of traditional advisor tech, it's for a single, laser-focused purpose: To fully support every stage of the advisor-client journey.

Part of this commitment means recognizing and adapting to the overall industry shift from an investment-centric value proposition to one that prioritizes planning-focused advice. As the value a financial advisor provides evolves, so too does the technology supporting that value.

And the evolution of advisor value isn't close to over. More than ever, helping investors feel understood and supported goes a long way toward alleviating the three drivers of bad behavior—fear, uncertainty, and isolation—which in turn can help them make and follow through on sound financial decisions.

In short, our industry has solved the investment problem. It's time to focus on the investor problem—encouraging good behavior by connecting planning and investing to the things that investors truly care about.

To help our advisors do that, we acquired HiddenLevers, a leading platform for risk analysis, investment process, and executive oversight in the wealth and asset management space.

Who Is HiddenLevers?

Founded in 2009 by bootstrappers Raj Udeshi and Praveen Ghanta, HiddenLevers is one of the industry's most lauded business intelligence, risk analytics, and economic research providers, supporting over 450 firms with nearly \$600B in

assets on their platform.

In addition, HiddenLevers offers client experience, business intelligence, and home-office solutions for financial advisors, asset managers, and wealth management executive teams. The cloud-based platform can be used to gauge client risk tolerance, stress test portfolios, and build recommendations that minimize risk while increasing the probability of meeting future goals.

HiddenLevers goes beyond the industry's typical approach to risk tolerance, which assigns an isolated number to define an investor's goals, time horizons, perceptions, and behaviors. Instead, HiddenLevers' platform takes into account a broad palette of potential economic events, stress tests portfolios and long-term goals in light of these events, and creates an actionable plan for reaching those goals, opening the door for more valuable advisor-client conversations and mitigating the tendency of investors to react hastily to market events.

Orion and HiddenLevers: Two Critical Pieces of the Client Experience Puzzle

HiddenLevers will bring its standout portfolio stress-testing technology to the Orion platform, helping advisors and investors understand the true risk present in their investments by calculating more than 75 "what-if" economic scenarios.

Equipped with HiddenLevers' stress-testing capabilities, advisors using Orion can dispel investor uncertainties by showing how specific "shock" events would impact their financial goals. HiddenLevers will also magnify Orion's ability to both understand an investor's risk profile and to generate proposals tailored to their specific needs.

Independently, HiddenLevers has created the following unique solutions that will now be extended to Orion advisors:

- **Advisor Platform**, empowering advisors to generate branded investment proposals; blend multiple strategies with an understanding of the blended impact on risk, total return, asset allocation, and yield; capture client risk tolerance; stress test investment portfolios using over 80 built-in scenarios, or change economic assumptions to create custom scenarios; and analyze and compare investment costs and advisory fees of clients and prospects.

- **Asset Manager Platform**, giving users the ability to stress test and perform comparative analytics on individual securities, portfolios, households, and models. The platform generates model insights and output suitable for institutional money managers; enables self-discovery and strategy selection by advisors; and connects model or portfolio improvement workflows directly to trading execution platforms or CRMs.
- **Business Intelligence Platform**, offering executive teams and key stakeholders full transparency into their business with customizable monitoring and visualization of risk, asset flows, asset drift, and firm-specific KPIs. Users can monitor risk to assets (AUM), clients, revenue, and profitability from the entire firm all the way down to the individual advisor's book of business, making it easy to manage growth in real time.
- **"War Room" Video Series**, a recurring discussion, highlighting various market-affecting scenarios and presenting an analysis of the potential "good, baseline, and ugly" outcomes, helping advisors stay informed about potential market changes.

Bringing Orion and HiddenLevers Together

HiddenLevers has long been a valued integration partner to Orion. Because of the platforms' open APIs and common code base, the combined experience is expected to come to market quickly.

HiddenLevers' disruptive solutions will fold into Orion's core technology platform and strengthen each pillar of the Prospect, Plan, Invest, and Achieve framework. Immediate synergies for combining our platforms include:

- **A Refined Risk Tolerance Questionnaire**: Orion's Risk Tolerance Questionnaire will also now include HiddenLevers' stress testing functionality, empowering advisors to win more business with the ability to show prospects the results of stress tests for top-of-mind concerns.
- **Compelling High-net-worth Offering**: Orion advisors can now leverage HiddenLevers to stress test specific concerns around "shock events" directly impacting individuals, families, and institutional investors with greater than \$1 million in investable assets.
- **A Best-in-Class Proposal Generation Tool**: Orion's existing proposal output tool will be bolstered by HiddenLevers' capabilities, giving advisors real-time feedback on blending models and strategies, as well as

their impact on the overall risk profile relative to the clients' risk scores.

- **A Robo/Automated Account Workflow:** "What-if" functionality built into an automated account workflow streamlines the process of preparing clients for the impact of different market scenarios on their portfolios, saving advisors time while enhancing the advisor-client relationship.
- **Expansive Business Intelligence:** Both Orion and HiddenLevers will demonstrate the essential value of business intelligence functionality, helping the C-suite at wealth management firms monitor revenue, risk, IPS drift, and advisor performance.
- **Robust Compliance Support:** HiddenLevers' risk monitoring capabilities broaden Orion's already-existing compliance functionality, including firm-wide surveillance of accounts and automated alert notifications around an entire book of portfolios.

More Information on This Exciting New Partnership

Can't wait to learn more about how Orion and HiddenLevers are coming together to help encourage better investor behavior and drive stronger advisor-client relationships? We've got you covered.

- Read the press release [here](#)!
- Visit our webpage to access up-to-the-minute news, videos from key players, FAQs, and more.
- And don't forget to join our webinar on March 29th at 2:00 p.m. CT to get all the details!

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