

Orion and BNY Mellon | Pershing expand integration to create a powerful advisor-client experience



An advisor's goal is to be a reliable resource to their client. Sometimes this could mean answering a quick question as a client navigates important decision-making through life's twists and turns. Quickly gathering necessary information or reports can be a challenge when the path forward includes multiple logins, manual reports, and a several screen set-up that rivals a NASA command center. Taking the first step to make the every day challenges easier, Orion and BNY Mellon|Pershing just launched a new integration point that is simple to use and saves valuable time.

More Flexibility + New Efficiencies

Orion and Pershing are focused on simplifying the steps it takes for advisors to provide top level service and the expert guidance their clients count on. Building upon the integrated electronic trading capabilities and advisory fee billing file, this new bi-directional single-sign on integration between Pershing's professional workstation, NetX360 and Orion Connect allows advisors to navigate seamlessly through both platforms with one login.

Deeper Insights + Enhanced Advisor-Client Journey

The enhanced API integration now provides advisors access to real-time positions, balances and activity on their client's account. The client experience is also further bolstered by giving investors the ability to have an at-a-glance view of custodial documents within Orion's Client Portal such as confirms, statements,

tax documents and notifications.

Once enabled, a new section appears in the document area of the portal for Pershing documents which includes the client's statements, trade confirms, tax documents and notifications for the past 2 years. In addition to combining and strengthening your client's portal experience, the added value of Orion using Pershing's API means there is no manual work beyond setup and the documents are immediately available the moment Pershing posts them.

The Beginning of a Stronger Relationship

The added API-level integration points and new bi-directional single-sign on are the first of a series of technology upgrades between Orion and Pershing in 2021. Stay tuned for continued enhancements that will further simplify the advisor-client experience. Get the inside scoop on the upcoming roadmap: Register today for the upcoming webinar with Orion's Eddie Sempek and Pershing's Christina Townsend.

Get started today

Current Orion Users: Contact sme-integrations@orion.com or 888.695.0523

Not already using Orion? Contact empower@orionadvisor.com or 402.496.3513 to learn more about this integration

1111-OAT-03/31/2021