

Orion and Fidelity Clearing & Custody Solutions® Eliminate Time-Consuming Paperwork with a New Digital Account Opening Integration



At Orion, we're pretty sure no one shows up to the office thinking, "Man, I hope I get to do a lot of tedious paperwork today."

And if you do, our new integration with Fidelity Clearing & Custody Solutions ("FCCS") probably isn't for you, since it eliminates paperwork completely from the account opening process.

That's right. We've enhanced our integration to include a completely digital account opening process.

Previously, opening new accounts could take days. And if the paperwork you received was incomplete or incorrect — leading to frustrating back-and-forth mailings with clients — it could take even longer.

Now, you can open new accounts in minutes.

Here's how it works: Simply push data from Orion's New Account Center directly into FCCS' new account workflow. That's it. Absolutely no time-consuming paperwork, and far less potential for account errors that cause headaches for both clients and advisors.

Less time spent opening accounts means more time spent working with your

clients, strengthening your relationships, and ultimately, growing your business.

The new digital account opening process is the latest in a long line of seamless integrations with FCCS, which include:

- The ability to push FCCS brokerage account and affiliate data directly into Orion Connect
- Direct access to Wealthspace with a single sign-on from the FCCS app within Orion Connect
- Real-time trade file capabilities, allowing you to send equities and ETF trades to FCCS through FIX connectivity within Eclipse™ trading

And we're not finished yet. Coming in September, we'll be adding FCCS tiles for balances, positions, and history at the account level in our Insight app, enabling you to share more custodial data with your clients.

For now, save time, save your sanity, save a tree: Learn more about our new digital account opening process during our upcoming webinar, held September 9 at 1 PM CT.

Not working with Orion yet? We'd love to start a conversation and show you what Orion can do to simplify your business. Let us know [here](#) and we'll give you a call right away!

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