

Getting Started in Orion Communities: What to Expect



So, you've subscribed to (or are thinking of getting started with) Orion Communities. Congrats! We're glad you see the value in a model marketplace where you retain trading discretion. We do too.

Once you receive access, you probably want to dive right into the platform to access the cost-effective, institutional grade model portfolios and scale your business accordingly. We're here to give you a peek into what you can expect when you get there.

The Lingo — Who's called what?

You are known as a *subscriber*. You can screen, sort, and identify asset managers and strategies. The *Strategists* are the Money Managers. They're the ones who offer the model portfolios and portfolio management processes you select from. Here are the ones available to you.



The Process – How to subscribe to a model

First, you do the obvious. Log into Communities right from your Orion trading tools, TOM or Eclipse. From there, you can review the available strategists using the search feature and decide which one fits your investment criteria. Then, you agree to the Strategist terms and subscribe to the desired models, all with just a click. Sit back and watch the models you subscribed to sync into Orion’s trading tools, TOM or Eclipse, where you’ll be able to assign them to portfolios.

The Difference – How is this different from the norm?

With Communities, you are able to rebalance the portfolios that you assign the Communities models to, as well as approve or deny future strategist model changes. You can also take advantage of investment research and vetting of strategists already performed, and easily apply advanced filters to identify strategists and model portfolios based on criteria that’s important to you, like theme type, risk score, manager and subscription fees.

The Outcome – What’s the end product?

At the end of the day, you create blended models using third-party strategist models, all while retaining control over whether to approve any model changes, and the trading of your clients' accounts.

<https://orionadvisor.tech.com/wp-content/uploads/2020/05/Communities-Subscriber-Overview.mp4>

We're constantly making improvements and enhancements to Orion Communities, including some updates in this month's software release. You can sign up for our Product Release Webinar, held on June 2 at 2 p.m. CT to see what we have in store. In the meantime, contact us if you have any questions!

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