

# Orion's Financial Planning Software is Single (Sign-On) and Ready to Mingle



The benefits of offering your clients formal financial planning services are numerous. From providing a better client experience to increasing your advisor alpha, connecting your clients' financial goals with investment performance data will help you differentiate yourself and your firm in a crowded wealth management industry.

In fact, according to Cerulli, nearly 50 percent of financial advisors call themselves "financial planners," meaning they offer a full range of planning services, such as savings goals (retirement, college), budgeting, tax planning, and insurance. Yet, in reality only 24 percent of them actually provide those planning services.

That's why at Orion we've made financial planning easy for advisors like you to add to your services by creating a single sign-on for Orion's financial planning software.

So, in the spirit of Valentine's Day, this week's Tech Tip will walk you through how to use this lovable single sign-on feature and create a data feed that allows your clients' financial plans to automatically ~~mingle~~ sync with their existing account information in Orion.

## Accessing Financial Planning from Orion

To get started using the single sign-on for Orion's financial planning software, sign into your Orion Connect portal and navigate to the Portfolio Audit App.

Next, complete the following steps:

1. Click on “Households” in the left column.
2. Select the household you want to send over to Advizr, Orion’s financial planning software.
3. Click “Links” in the top right corner.
4. Select “Advizr” from the drop-down menu.

From here, the Advizr software will launch, and you will complete the rest of the steps for setting up a financial plan for your client.

The screenshot shows the Orion software interface. On the left sidebar, the 'Households' link is highlighted with a red box and a '1'. The main area displays a table of households. The household 'Washington, George (54)' is highlighted with a red box and a '2'. In the top right corner, the 'Links' button is highlighted with a red box and a '3'. A dropdown menu is open, showing 'Advizr' as an option, which is highlighted with a red box and a '4'.

| Household ID | Active | Last Name  | First Name              | Full Name                         | Net Value       | Representative |
|--------------|--------|------------|-------------------------|-----------------------------------|-----------------|----------------|
| 46           | ✓      | Smurf      | Papa                    | Papa Smurf                        |                 |                |
| 48           | ✓      | Adams      | John And Abigail        | John                              |                 |                |
| 49           | ✓      | Franklin   | Benjamin And Deborah    | Franklin, Benjamin                |                 |                |
| 50           | ✓      | Hamilton   | Alexander And Elizabeth | Hamilton, Alexander And Elizabeth | \$3,415,887.79  | Todd           |
| 51           | ✓      | Jay        | John And Sarah          | Jay, John And Sarah               | \$3,415,887.79  | Todd           |
| 53           | ✓      | Sharpe     | Jeff                    | Jeff Sharpe                       | \$2,980,923.67  | Todd           |
| 54           | ✓      | Washington | George                  | George Washington                 | \$2,980,914.79  | Todd           |
| 83           | ✓      | Bertucci   | Unique                  | Unique Bertucci                   | \$22,748,768.51 | Todd           |
| 91           | ✓      | Smith      | Jane                    | Smith, Jane                       | \$859,110.42    | Todd           |
| 93           | ✓      | Bierm      | Fierm                   | Fierm Bierm                       | \$22,748,768.51 | Geor           |
| 94           | ✓      | Lungdren   | Dolph                   | Ivan Drago                        | \$22,748,768.51 | Joel I         |
| 95           | ✓      | McMullen   | Unique                  | Unique McMullen                   | \$22,748,768.51 | Ryan           |
| 96           | ✓      | Martin     | Steve                   | Martin, Steve                     | \$2,980,914.79  | Geor           |
| 97           | ✓      | Knox       | Henry and Lucy          | Knox, Henry and Lucy              | \$2,980,914.79  | Joel I         |
| 98           | ✓      | Van Dyke   | Dick and Arlene         | Van Dyke, Dick and Arlene         | \$2,980,914.79  | Ryan           |
| 99           | ✓      | Farley     | Christie                | Farley, Chris                     | \$2,980,914.79  | Geor           |
| 100          | ✓      | Prescott   | William and Susan       | Prescott, William and Susan       | \$2,980,914.79  | Geor           |
| 101          | ✓      | Gable      | Clark and Kay           | Gable, Clark and Kay              | \$2,980,914.79  | Ryan           |
| 102          | ✓      | Reid       | Andy and Tammy          | Reid, Andy and Tammy              | \$2,980,914.79  | Geor           |
| 103          | ✓      | Revere     | Paul and Sarah          | Revere, Paul and Sarah            | \$2,754,197.13  | Joel I         |
| 104          | ✓      | Grant      | Carol and Betsy         | Grant, Carol and Betsy            | \$2,980,914.79  | Ryan           |

## Starting a New Financial Plan

Once you have completed the single sign-on within Orion, you are ready to start creating a financial plan for your client.

### Please map the following asset classes

Changes to your asset class mapping can be made at a later time in your firm's [settings](#) page.

| ORION ASSET CLASS          | ADVIZR ASSET CLASS |
|----------------------------|--------------------|
| 18 Emerging Equity         | Unknown ▼          |
| 19 Emerging Markets Bonds  | Unknown ▼          |
| 20 Emerging Markets Equity | Unknown ▼          |
| 21 Equity                  | Unknown ▼          |
| 22 ETF                     | Unknown ▼          |
| 23 Exchange Traded Note    | Unknown ▼          |

Confirm

If this is your first client, the first Advizr screen (shown above) that pops up will ask you to map Orion asset classes to the Advizr asset classes. You do not have to complete this step right away. To skip this process, hit “Confirm” to be taken to the client’s homepage.

In addition to the client’s name, the client homepage will display in the left column the client’s investment accounts that were set up in the Orion platform.

George Washington

Search for clients

ACCOUNTS

Investment ▲ \$2,980,915

| ACCOUNT               | AMOUNT      |
|-----------------------|-------------|
| Fidelity - George ... | \$704,416   |
| Schwab - Martha ...   | \$2,121,813 |
| TD Ameritrade - ...   | \$154,685   |

YOUR NET WORTH

\$2,980,915

Add Account

Link Management

Add An Executive Summary

Financial Planning

The best way to reach your financial goals is to have a plan. Even if the future is uncertain, set a goal today.

Start Planning

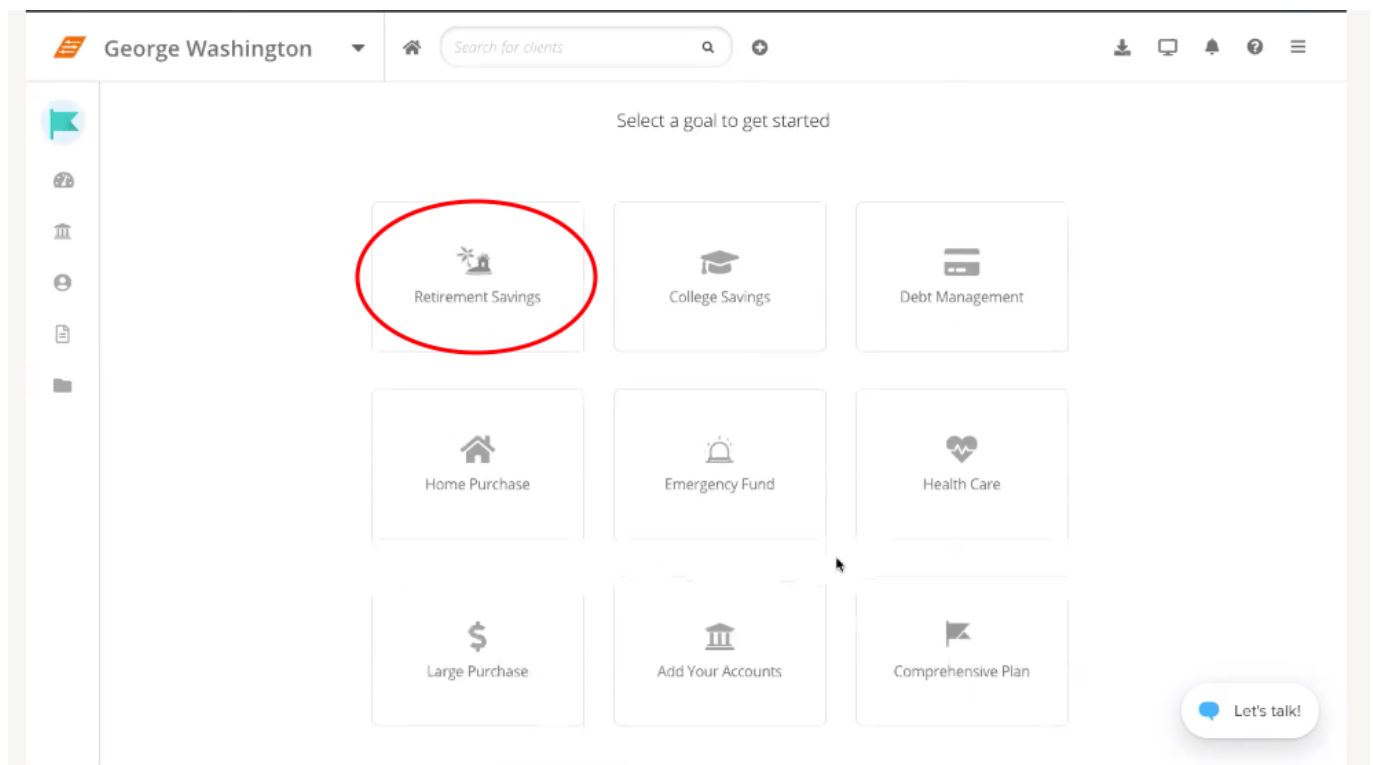
Net Worth (Year to date)

Let's talk!

To get started with a financial plan, select the “Start Planning” blue button in the middle of the screen. You will then choose a goal from the list:

- Retirement Savings
- College Savings
- Debt Management
- Home Purchase
- Emergency Fund
- Health Care
- Large Purchase

Note that these goals can be completed by yourself, during an in-person meeting with your client, or by sending your client an invitation to have them fill it out on their own.



We will do a walkthrough of the Retirement Savings section as an example, but these same steps can be used as a guide for the other options as well:

The screenshot displays the Advizr user interface. At the top, the header includes the user name "George Washington", a search bar with the placeholder "Search for clients", and several utility icons. On the left, a vertical sidebar contains icons for various functions. The main content area features a progress bar at the top with a "Previous Step" link on the left and a "25% Complete" indicator on the right, which is circled in red. Below the progress bar, the question "Do you have children?" is centered, followed by two radio button options: "Yes" and "No". A blue "Next Question →" button is positioned below the options. At the bottom right, there is a "Let's talk!" chat bubble icon. The footer contains copyright information for Advizr, Inc. (2019) and links to "disclosures", "Privacy Policy", "Terms and Conditions", and "Feedback".

1. Notice that information that was already in Orion — such as age, name, and marital status — will pre-populate and will count toward the total progress toward the goal (as shown above).
2. Next, answer a series of questions.
3. Review the information.
4. Then click “Take Me to My Plan,” where you can then create what-if scenarios and the advice you’re going to give to the client.

## Checking the Flow of Information Between Orion and Advizr

The screenshot shows the Advizr interface for a client named George Washington. On the left, a sidebar contains a 'PROFILE' section with a red circle around the 'Profile' icon and a list of categories: Personal Info, Income, Expenses, Goals Input, Accounts, Other Assets, Insurance, Equity Compensation, Trusts, Taxes, and Risk Tolerance. The main area is titled 'Personal Information' and contains form fields for 'First Name' (George), 'Last Name' (Washington), and 'Year of Birth' (1975). Below this is a 'Partner' section with fields for 'First Name' (Martha), 'Last Name' (Washington), and 'Year of Birth' (1975), along with a 'Remove' button. A 'Children' section has an '+ Add Child' button. A green 'Save Changes' button is at the bottom left of the main area. The footer includes copyright information for Advizr, Inc. (2019) and links to Disclosures, Privacy Policy, Terms and Conditions, and Feedback. A 'Let's talk!' button is in the bottom right corner.

You can view all of the information from Orion and any extra information you or your client enter into Advizr in the Profile section located on the left side. That information can include:

- Personal Information
- Income
- Expenses
- Goals Input
- Accounts
- Insurance
- Equity
- Trusts
- Taxes
- Risk Tolerance

You can also determine the settings you want to use, including the asset classes mapping that you may have skipped at the beginning.

To customize Advizr, select “Settings in the top right.” From there you can white label your service by adding a logo, custom signature, and disclosures.

Search for clients


### Application Settings

- MY SETTINGS
- FIRM SETTINGS
- INTEGRATIONS
- MODEL PORTFOLIOS
- ASSET CLASSES
- CMAS

Settings (circled in red)

- Send Feedback
- Log Out

#### Contact Information



Drag and drop here, or click below to upload your profile

Upload Photo

|  |                                      |
|--|--------------------------------------|
| First Name   | Last Name                            |
| <input type="text" value="Spencer"/>                   | <input type="text" value="Fleming"/> |
| Email  | Phone Number                         |
| <input type="text" value="spencer.fleming@orion.com"/> | <input type="text"/>                 |
| Calendly URL   |                                      |
| <input type="text"/>                                   |                                      |

#### Custom Signature

Enter custom signature

255 characters remaining

In addition to asset class mapping, you can also change assumptions to set global settings or settings per client, and check out model portfolios.

To watch a video on how to complete any of these processes, check out this walkthrough. For more tips on how to harness Orion's financial planning software, contact our Financial Planning Team.

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