Orion Live and On Demand: Three Chances to Grow Without Leaving Home

Events, conferences, and trainings look a little different these days. But the beauty of technology is that while we're all staying safe and social distancing, we can still learn, share, and grow—and we're offering plenty of opportunities for you to do that with us, virtually.

May Ascent

We've transitioned our upcoming Ascent Regional events to a virtual forum, kicking off with our May 12 conference. Right from your living room, you can boost your Orion tech expertise, watch our latest innovations in action, and even schedule consultation appointments with our team.

And during the May conference, you'll hear from Josh Brown, CEO of Ritholtz Wealth Management, LLC, about the role technology plays in your firm's unique value proposition. You'll also catch an Ascent Exclusive market update from Rusty Vanneman, CIO of Orion Advisor Solutions.

Interested? View the full May agenda and register here!

June Ascent

If you can't make our virtual May event, you have another chance to join us on June 3. We're so excited to bring keynote speaker Bert Jacobs, CEO and founder of Life is Good, to your screen for an inspiring, timely discussion on Harnessing the Power of Optimism to Innovate and Thrive in Times of Change.

Robert Baker, President of Advanced Asset Management Advisors, will also give a market update during the conference. Don’t wait—check out the full agenda and register here!

Financial Planning Webcast Series

Perhaps one of the most compelling arguments we’ve seen arise during this pandemic is the case for financial planning. With its proven track record of creating value for investors during times of crisis, such as the Great Recession in the early 2000s, there’s no better time than now to offer financial planning to your clients.

We believe so strongly in the power of financial planning that we dedicated a three-part webcast series to unpacking its benefits, offering best practices, and exploring industry trends.

Part One, Put Planning First, offers guidance and best practices for getting your planning efforts off the ground.

Part Two, The Human Advantage in Uncertain Times, provides actionable tips for leveraging your financial planning technology to strengthen your client relationships.

And be on the lookout for Part Three, Financial Planning Post-Pandemic, coming soon. You’ll learn critical steps you should take today to prepare your business for our post-COVID19 world.

Interested in getting in touch with us right away? Contact us today to learn more about how our solutions can help you operationalize your vision for success!

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