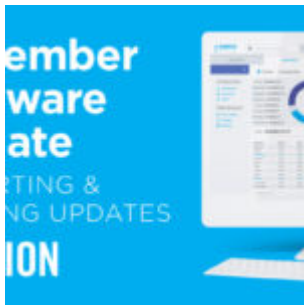


November Software Update: Reporting and Trading Updates



The holiday season is about to hit full swing, and on November 11 we're bringing you a few early Christmas presents to your Orion experience.

In exactly four days, you'll have your hands on all the new updates and enhancements we're rolling out in our November 2017 software update. Before we get there, though, we want to help you gain a deeper understanding of some of the updates releasing in November.

Over the next few weeks, we'll be publishing deep dive blogs on various topics and in today's post, we're going to cover some of the more notable enhancements to Reporting and Trading.

Trading

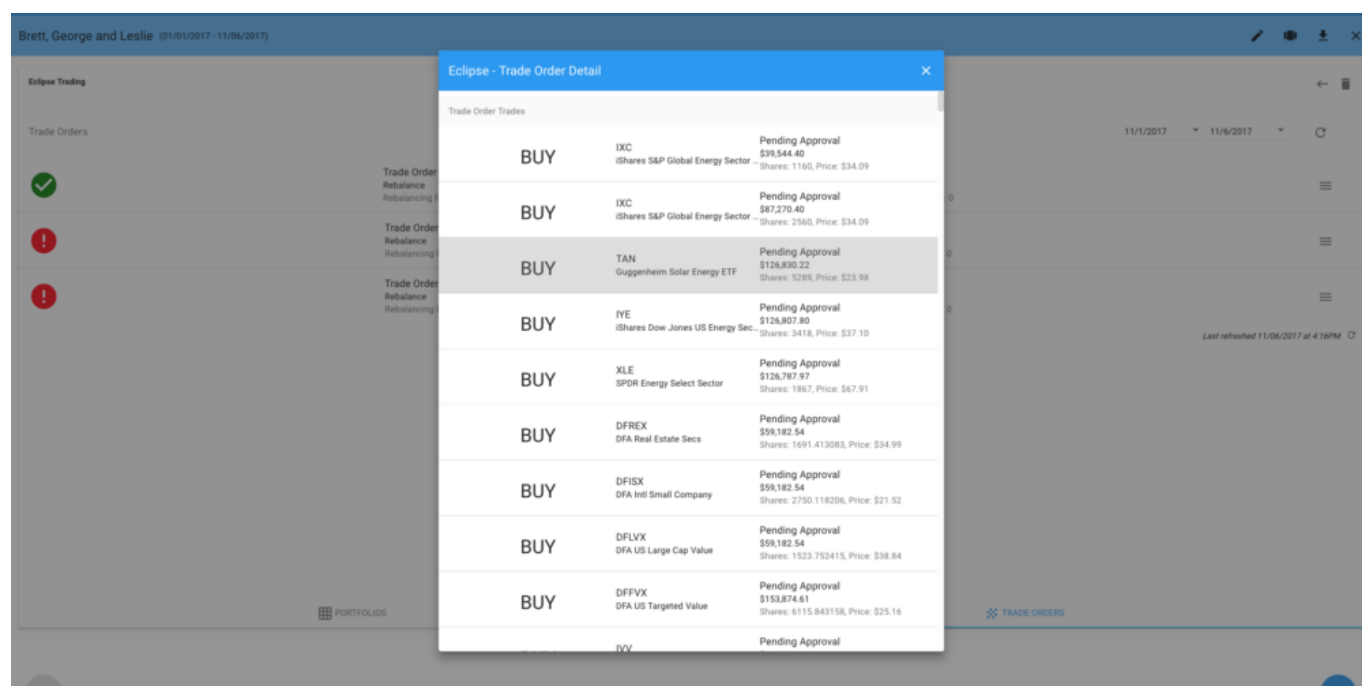
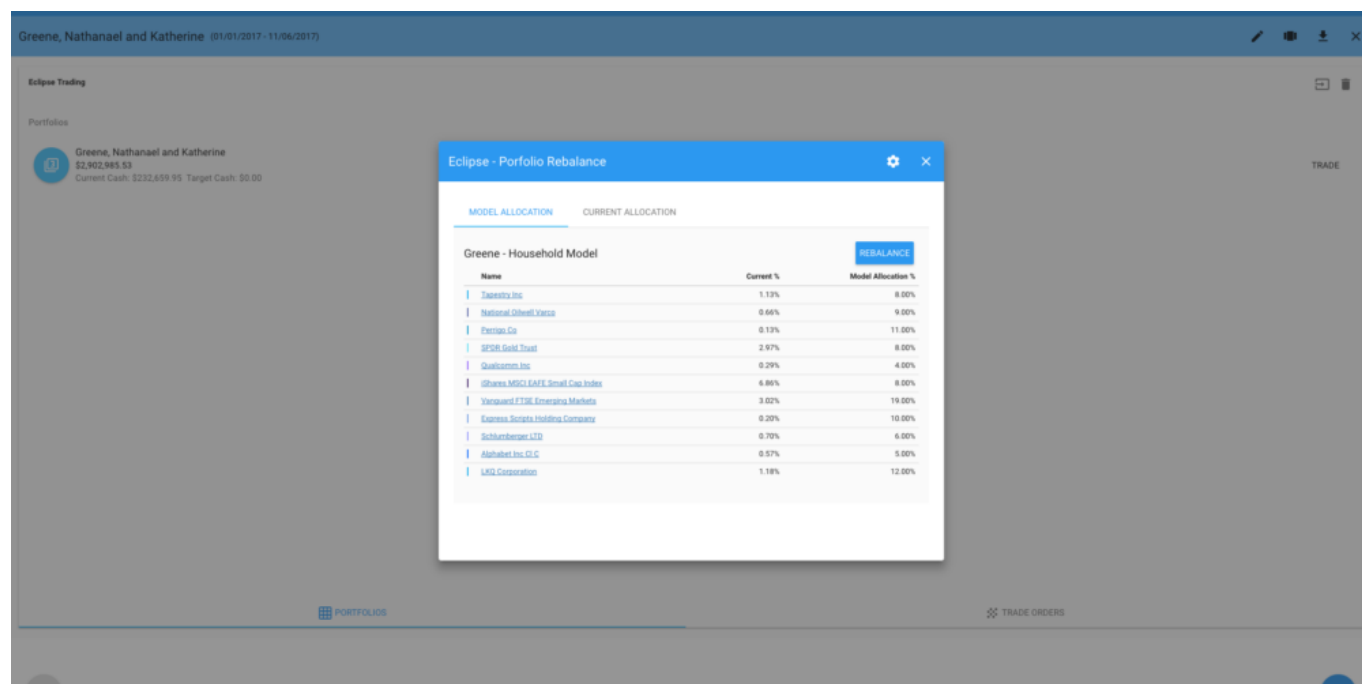
First, let's tackle trading.

We've been working overtime to get **our next-generation trading and rebalancing platform, Eclipse™**, into your hands. We're happy to report that the beta testing is going well and we're still on target for a full launch to all our clients later this year.

Along with Eclipse™, we'll also be launching **Orion Communities, our peer-to-peer model marketplace** component of Eclipse™. You'll be able to sign up as either a Strategist (upload and share your model portfolios) or a Subscriber (subscribe to models from Strategists) or both! For more information about

Eclipse™ and Communities, log into Orion Social to view our overview videos for a more in-depth look at functionality.

Along with Eclipse™ and Communities, we're also extending your ability to trade from an Orion Connect-integrated CRM. We've built **new trading widgets** into the Insight app that will allow you to trade while interacting with those tiles.



The full Orion Connect experience is available in both the Redtail and Salesforce CRMs. When the November release comes out, you can add these tiles to Insight and get to trading without leaving one of these two CRMs.

Reporting

Let's start our Reporting section with the one thing everyone wants to know.yes, the **Report Speed Improvements** are real. You and clients will see an improvement in how quickly reports generate because we've reengineered how cost basis is gathered.

The speed of reporting enhancement is more of a back-end change so there's no pretty picture to show you, but we know this is an enhancement you're going to appreciate.

Speaking of pretty pictures, though, we do have some visual updates to reporting that we're excited to share.

We're introducing **alternate line shading** into our existing Report Themes tool. This visual update will allow you and your clients to better read reports. You'll also avoid possible confusion caused by reviewing a portfolio on a PDF style report. If you've got a part of a report that's a few columns wide, this is a report change you'll love.

Alternate Line Color Example

Household: Will and Jada Smith
Period: 7/1/2017 to 9/30/2017



Accounts Included in this Report					
Account	Account Type	Custodian	Account Number	Management Strategy	Market Value
Jada Smith	Individual	Fidelity	*****-210	Income	\$578,146.15
Will and Jada	Joint	Fidelity	*****-130	Brokerage	\$818,355.35
Will and Jada	Joint	TD Ameritrade	*****-135	Brokerage	\$136,471.00
Will Smith	Roth	TD Ameritrade	*****-215	Retail	\$136,346.88
					\$1,669,319.38

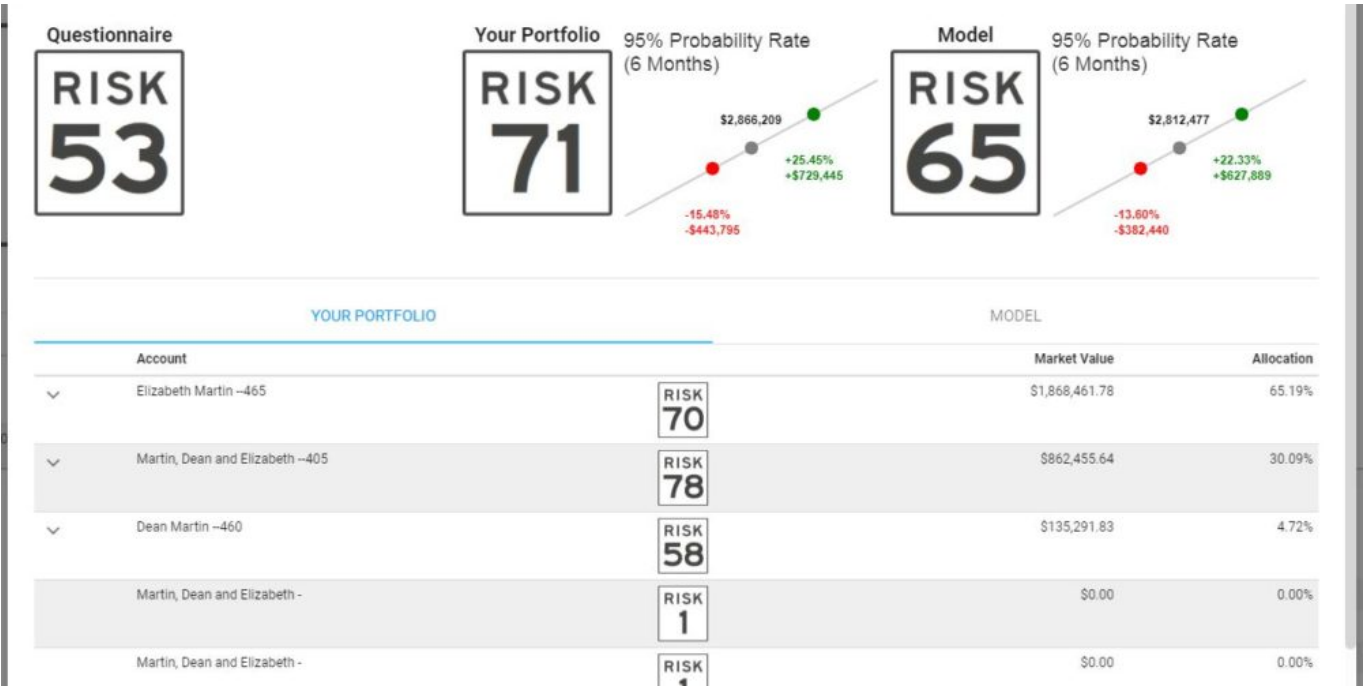
Another design change we're implementing is to **move your sub-report disclaimers to the end of each report**. This design change will make reports much more user friendly and bring a fresher look to the overall document. Some of the disclaimers you'll now see at the end would include report parameters and information like Net of Fee returns, including accrued interest, and the

annualization method of performance.

The best part about all these updates so far? There’s nothing you actively need to do to enable them. They’ll be in effect when the software update rolls out Saturday.

Let’s move on and take a look at a few other new report enhancements that you’ll love. These additions can be found in our Insight app and will provide a big boost to your client meetings as well as your utilization of an integration.

We’re releasing **a new Riskalyze integration tile** that will bring you your Riskalyze Retirement Map right in Insight. If you love reviewing your Riskalyze data with clients, this will be huge.



Next up is an **Insight integration tile with HiddenLevers**. Again, this is big for client meetings. When many advisors meet with clients, there’s a focus on discussing return and its correlation to risk. This tile will help you have an easier discussion with clients by showing you data from HiddenLevers about Risk vs Return.

We’re also adding a user interface to help you control our metadata compliance feature. This new feature allows you to send a copy of each report generated in the Orion platform to an SFTP server for archived storage or review. *Be on the*

lookout for a detailed blog describing the new Archive tool, coming soon.

Have any questions about the content covered in today's post? Fire up Orion Social and send a chat to either our Reporting or Trading SME teams.

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