

Orion + Schwab Advisor Services Maximize Advisor Efficiency With Integration Update



Any update that can save an advisor time is a good update in our book. And like you probably know, we keep that book wide open because we're always looking for new and better ways to help our advisors.

That's why we've deepened our existing integrations with Schwab Advisor Services™, one of the largest RIA custodians in the business, so advisors can save time in the tools they use the most on a daily basis.

With the latest integration update, advisors now have access to another tool to eliminate the need to toggle between their custodial platform, Schwab Advisor Center® and Orion:

- **Digital address change submission** from Orion to Schwab, so you can maintain accurate household details across systems.

The thought is to allow advisors to stay in one platform as much as possible. The existing features, paired with the latest, accomplish that effectively, in a quest for a comprehensive experience between Schwab Advisor Services™ and Orion's platform.

Our existing integration made it easy for advisors to work between Schwab Advisor Services™ and Orion. As you've heard, some of those access points included:

- Digital account open workflow in Orion Connect allowing you to start from Orion's New Account Center app, launch the new digital account opening experience, and push relevant Orion data right into your custodial new account workflow.
- Daily reconciliation of Schwab client, account, position, cost basis, and transaction files for up-to date and accurate information.
- Single-sign on to Schwab Advisor Center from Orion, including contextual links so advisors can jump directly to the same information between systems.
- Direct fee file upload from Orion to Schwab Advisor Center, including single-sign on into your Management Fee center, so advisors can complete billing processes in less time.
- Real-time Schwab data accessible in our client presentation tool, Insight, with tiles for balances, transactions, holdings, cost basis, and documents stored in Schwab Advisor Center.

We know the update to the existing integration will save advisors time on a daily basis. And as the old saying goes, time is money.

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!

Orion does not endorse any particular third-party product or service. Our clients should undertake their own assessments to determine whether these parties meet their business and due diligence requirements.

1174-OAS-11/15/2019