

Orion Weekly Roundup: April 23, 2021



This week's blog roundup is full of deep investing insights, advice for new advisors, and even insight into how your firm can benefit from a certain video-first social media platform.

Rusty's Monday Morning Insights

This week's Monday update included a look at corporate earnings. In short, they're good. At this pace, earnings are expected to be up 30% - the best potential quarter since the third quarter of 2010.

Get the full scoop.

Introducing the Tax-Efficient Portfolio

Join Orion Portfolio Solutions' Rusty Vanneman, CFA, CMT, in a brand-new webinar series.

In our second episode, Rusty is joined by Ryan McMahon, CFA, Senior Vice President of PIMCO's Global Wealth Management Team, and Ryan Pogodzinski, CFA, Consulting Director for Russell Investments' Advisor and Intermediary Solutions business to talk about enhancing tax efficiency.

Listen now.

How to be Rookie of the Year

Advisors just beginning their careers in wealth management have different needs than industry vets who have been established for years, including growing their book of business, finding their niche, getting comfortable with compliance regulations, and more.

Get the tips you need to start your career right.

5 Ways to Get into FinTok

Looking for new ways to grow your audience and maybe even go viral? Social media platform TikTok can offer a whole new generation (literally) of people who need financial education.

Read 5 ways to get started.

Can You Benefit from Direct Indexing?

Direct indexing might seem like a new trend, but it's been around for a while. Now, however, any type of investor can benefit because of technology enhancements.

Here's what to know about this strategy and when to know if it makes sense for your firm to implement.

Get started.

Ready to Watch and Learn? We keep a library of on-demand webinars. Click here to watch one whenever you'd like!

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