

# Orion Weekly Roundup: April 9, 2021



The first quarter of 2021 is behind us, and we're hitting the ground running in Q2.

Catch up with all the blogs published this week—from market insights, to tips for running effective meetings, to why you should update to the new Orion Client Portal as soon as possible.

Have a great Friday!

## **Monday Markets Recap with Rusty**

We cover the markets every single Monday over at the Orion Portfolio Solutions blog. This week, Rusty Vanneman, Orion's Chief Investment Strategist, analyzes the vaccination rate, what's ahead for inflation, and how the markets might feel about potential infrastructure spending.

[Click here to read it all.](#)

## **Run Better Planning Meetings**

A great meeting isn't all about the conversation that takes place in a 60-minute window when you've got a client in your office or on the other side of a Zoom. It's also about what you do before and after that meeting to create an experience that serves your client well all the time.

Compare your meeting routine to the 8 steps in our Orion Advisor Tech blog and see if your financial planning software is doing enough to support your team.

Read it now.

## The New Client Portal is Ready

Have you made the switch to Orion's new Client Portal? The update enhances the client and advisor experience in every aspect—from how easy it is to find the information you need to the speed of navigation.

Our team is standing by and ready to help you make the change. Click into the blog to get all the details about updating your portal and get access to resources to help you communicate the change to clients.

Make the change today.

### 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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