



Orion Weekly Roundup: February 19, 2021

Congratulations, you've made it to another Friday! But don't let the week pass you by just yet. First, catch up on articles about financial planning, behavioral portfolios, the value of Monte Carlo simulations, and email marketing.

Here's your Orion news from this week.

Setting Your Firm Apart with Financial Planning

Do you know your firm's unique value proposition?

Do you know the role that financial planning can play in your value?

If you're not sure about an answer to either one of those questions, this is a webinar you'll want to join. Brandon Marcott, CFP, will provide you with actionable steps to put planning at the center of your value on February 23rd.

Learn how to increase your value

Plan Ahead with Monte Carlo

While we're on the subject of financial planning, how about an article about one of the most widely-used tools in the financial planner's toolkit?

The Monte Carlo simulator is a core component of figuring out what the future *might* look like for an investor's portfolio.

We dig deeper in the history of the analysis (where did that name come from, anyway?) and show you how we use it in the Orion Planning app.

Read the full article

Constructing Better Behaved Portfolios

Why do people make the choices that they do?

From an investing perspective, behavioral finance tries to make sense of those decisions and understand why investors choose to sell or buy certain assets at certain times.

This blog features two strategists on Orion Communities who focus on behavioral finance in their portfolio design.

Find out more about behavioral portfolios.

What's Your Click Rate?

When you send an email, you want people to read that email.

The biggest factor that determines whether an email gets read or not is usually the subject line.

Our last blog in today's roundup is all about email marketing for financial advisors. We've got 3 tips for writing better subject lines and a whole more about the effectiveness of email, and why it should be a central player in your marketing strategy.

Learn how to write better emails.

Did you know all of our webinars are available on demand? If you missed one, click here to watch it whenever you'd like!

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