

Orion Weekly Roundup: February 26, 2021



February is almost over and Spring is on the way.

Flowers will be blooming soon, but right now we've got stories and features blooming on the Orion blog. Maybe not as fragrant, but definitely just as exciting.

Here's your Orion news from this week.

Impress Clients with Custom Reporting

If you've been an Orion user for years, you're familiar with our Report Builder.

Report Builder does more than simply drag and drop the data you want into beautiful new reports. It also gives you the opportunity to tell the right story to each client and customize your meetings to their values and needs.

Become a better storyteller with the right reports.

Serve Up Content That Grabs Eyes

Orion CMO Kelly Waltrich shared her marketing insights with Digital Wealth News to give financial advisors ideas for how to get ahead with content marketing.

If you want to create content but don't know where to start, this article will help you think about marketing and how to make sure that you get attention from the

right people.

Read the full article.

Innovative RIAs Are Doing This—Are You?

Business development isn't easy.

But learning from others can help you accelerate your sales and level up your ability to find and close new business.

In our recent webinar, we dug into the business development practices that most RIA firms aren't using, but should.

Watch it now to improve your business development.

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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