

Orion Weekly Roundup: March 19, 2021



If you missed any Orion news this week, don't worry—we've got you covered! Check out our weekly recap below.

Communicating the Value of Financial Planning

When a prospective client visits your website or sees an advertisement from your firm, do they see the complete value that you bring to their life?

This blog post looks at how to communicate the role of financial planning when marketing your firm's services to help you tell prospects a story they'll want to hear.

[Read more here.](#)

Monitoring Employee Trades Made Easy

Orion's platform contains some powerful compliance monitoring tools—including the ability to monitor employee trades so you can keep yourself on the right side of compliance.

Not many people think of trade monitoring as streamlined and intuitive, but our compliance suite is changing that. Check out the blog for all the details on how to simplify your compliance workflows.

Make trade monitoring a snap!

Market Insights with Rusty Vanneman

Rusty Vanneman, CFA, CMT* and Chief Investment Strategist at Orion Portfolio Solutions, clarifies what's going on in the financial markets every Monday.

This Monday, Rusty looks at the “March Madness” of the markets—will smaller companies continue to outperform?

Recap the markets with Rusty.

Megatrends Arrive

Can you use megatrends to seek excess returns, while still attempting to manage risk and the right asset exposure in portfolios?

Blackrock has brought their megatrend ETF strategies to Orion Portfolio Solutions, and in our recent webinar we answered that question plus many others.

Watch the on-demand replay to learn how to get started with the Orion Portfolio Solutions Megatrends model portfolio now.

Catch the replay!

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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