

Orion Weekly Roundup: March 5, 2021



March has arrived, and we've got a new slate of blogs to accompany it.

In this week's round up, catch up on what you might have missed this week with news about our newest integration partnership, ways to make moves on social media, and how your technology can not only make you a better advisor but also improve how you act as a fiduciary to your clients too.

Here's your Orion news from this week.

Offer Credit and Cash Solutions to Your Clients

We've partnered with our friends at Focus Client Solutions to bring comprehensive offerings most typically associated with banks to every RIA in the nation.

Read the article below to learn more about using these tools to attract and retain high-net-worth clients to your business.

Offer more comprehensive services.

Get Social and Grow Your Business

By now you know that you should be on social media—but do you know what to do once you're there?

We're breaking down best practices for how to grow your business by focusing

your attention on what works on social media.

Learn the best way to use social here.

Market Movement with Rusty

Did you know Rusty Vanneman, CFA* and Chief Investment Strategist at Orion Portfolio Solutions, offers up a recap of the market every Monday?

Check out his latest to stay current with interest rates, treasury yields, and a bonus quote from the Oracle, Warren Buffet.

Recap the markets with Rusty.

Can Technology Make You a Better Fiduciary?

We think it's clear that using technology to automate tasks and assist you throughout your day can help you be a more focused, productive advisor.

But can your choice of technology also assist you in your pursuit to become a better fiduciary for your clients?

We think the answer to that is clear too—and our blog at Orion Portfolio Solutions offers 5 reasons how technology does it.

Become a better fiduciary with great tech.

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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*The CFA® is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals. To learn more about the CFA charter, visit www.cfainstitute.org.

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