

Orion Weekly Roundup: May 3, 2021



In this week's blog roundup we talk all things inflation, practice tips for advisors seeking independence, strategies to get your clients to actually take your advice, and our weekly market insights.

Rusty's Monday Morning Insights

In this week's "Monday Morning Insights," Orion Portfolio Solutions' Chief Investment Strategist Rusty Vanneman reviews the bottom line on the potential tax impact from President Biden's plan, which he predicts will dominate headlines for a while. Keep investors at ease by reading our insights [here](#).

Check out Rusty's market review.

Portfolio Recipes: Brinker Capital and Main Management

With an inflation scare in the air, financial advisors are faced with the challenge of how to best protect their clients. At Orion, we have the answer—pair together Brinker Capital Investments' & Main Management's strategies to best balance clients' portfolios.

Create the perfect portfolio recipe to aid clients amidst inflation.

Go-To Tactics That'll Get Clients to Take Your Advice

Do you think of yourself as a leader? In the second installment of our Advisor Lifecycle series, find out why being one is so critical to your role as a financial advisor, and how you can use Dr. Daniel Crosby's six pillars of influence to help guide your clients to better outcomes.

Become an improved leader today.

Magnus Financial Group's 7 Best Practice Tips

Our Breakaway Spotlight series continues, and this time, with Michael Schwartz, CEO and Founder of Magnus Financial Group. We dive into his best practice tips and valuable insights for advisors interested in going down the path to independence.

Learn Michael's top seven insights you need to know.

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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