

Orion with Fidelity Clearing & Custody Solutions®: A Collaboration Built for Growth



In all aspects of life and business, we believe success is driven in large part by those you surround yourself with. At Orion, we embrace the power of strong relationships. We believe that in order to offer the best products and services to advisors, we must align ourselves with some of the best CRM, financial planning, and custodial systems in the industry.

One of our strongest relationships is with Fidelity Clearing & Custody Solutions (FCCS).

By working with FCCS, we've been able to give advisors access to comprehensive brokerage and investment product solutions. And now, upcoming enhancements and a unique industry event are giving us a lot of reasons to be excited about the future, helping to lead advisors to greater success.

What we're looking forward to

We plan to build on the already powerful collaboration between Orion and FCCS in 2019.

One of the exciting enhancements we're working on is a new FCCS Digital Account Opening tool. Once available, advisors will be able to open new Fidelity accounts in just minutes. Also, this new enhancement will help reduce the amount of paperwork needed when opening FCCS accounts.

Another upcoming feature of our collaboration with FCCS is a real-time data widget within Insight - our client presentation tool. With this new feature,

advisors will have access to real-time account-level data including balances, positions, and history. This will make it easier to access the most up-to-date information.

Ascent 2019 Boston, Orion | FCCS

This August, Orion and FCCS are collaborating to host our Ascent 2019 event in Boston. It's a jam-packed agenda with both of our companies ready to enlighten you with technology insights and new strategies to help optimize all aspects of your business.

This event will feature eye-opening breakout sessions to arm you with new information, ideas, and a renewed passion to innovate. You will also have an opportunity to take part in one-on-one consultations with Orion's Subject Matter Experts. These consultations have proved to be extremely popular with Ascent attendees, here's what some have had to say:

"SMEs were fantastic! I had in-depth sessions on trading, TLH, model building, reporting, compliance, inform, integrations.....great stuff!"

"Orion Staff is amazing - Love the knowledge base they have and they seem to really enjoy their work."

"The 1:1 breakout was EXTREMELY useful. I was able to cover quite a few questions and get the answers I needed."

Plus, by attending Ascent in Boston - you can take part in a networking event during a Boston Red Sox game at legendary Fenway Park. It's an opportunity that may help you grow your circle of professional influence.

Click below to register and discover how your firm can innovate, disrupt, and win in 2019!

REGISTER

And be sure to check out some of the highlights of our past Ascent 2019 stops in this blog post.

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