Orion’s Advisor Lifecycle Series, Part One: Rookie of the Year

At Orion, we spend a lot of time focusing on the advisor-client journey; particularly the client piece, since it’s our goal to help advisors turn prospects into clients and clients into advocates.

But what about the advisor journey as its own entity?

Advisors just beginning their careers in wealth management have different needs than industry vets who have been established for years, including growing their book of business, finding their niche, getting comfortable with compliance regulations, and more.

In our new three-part series, we’re taking an in-depth look at the entire advisor lifecycle, from first-year rookies to seasoned pros.

The first installment focuses on advisors who are new to the industry, featuring both Orion experts and already-established advisors sharing wisdom from their early years. During this on-demand presentation, you’ll learn:

- What you need to know about licensing
- The pros and cons of starting a new firm
- How to choose the best technology for your business
- Tips for acquiring clients
- And more

Check out the on-demand webinar by clicking here!

And if you’d like to sign up for installments two and three of this valuable series, you can do so here.

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