Orion’s Can’t-Miss Hits of Summer 2019

Summer of 2019 is finally here!

The days may be getting longer, but that doesn’t mean you want to spend more time working on tedious back-end tasks, like reporting, trading, and compliance. At Orion, we dedicate our time to simplifying the complexities of running your business, so you can dedicate your time to improving client relationships and growing your firm.

To celebrate the summer solstice, we’ve put together a list of some of our most popular time-saving features to make sure you don’t miss a thing. So grab your popcorn and check out what’s going on at Orion.

The Blockbuster

ASTRO Transforms Custom, Tax-Efficient SMA Portfolios

Join ASTRO, Orion’s portfolio optimizer, for a showdown against time-intensive portfolio creation and spreadsheet inefficiency. ASTRO’s secret weapon is a well-defined process that tailors portfolios for performance, risk, and tax efficiency around desired target strategies.

ASTRO puts the power of direct indexing, tax-loss harvesting, and seamless transition management into the hands of advisors, empowering them to be the heroes for their clients by staying constantly alert for opportunities to reduce capital gains and generate tax alpha.

(Want a sneak peek? Check out our ASTRO ebook here)

The Sequel

Report Builder: The Next Generation

Fans of the original Report Builder will love the latest installment.

In this new edition, Report Builder continues to streamline advisor operations and enhance client experiences. But this time, Report Builder teams up with Compliance to make it easier for advisors to stay on top of SEC regulations by seamlessly including reports in the Compliance Archive.

Report Builder also offers more flexibility: alternate line shading on individual elements gives new depth and clarity to client reports, which takes the client experience to a whole new level.

(Learn more about the brand new Report Builder here)

The Runaway Indie Hit

10 Things to Love About Insight

An instantly lovable feature, Insight surprises and delights clients with its customizable, interactive presentations about the data they need most. This app is sure to charm advisors as well, thanks to its simplicity, style, and ability to stimulate meaningful conversations with their clients.

Advisors can set the scene for client meetings by displaying household and account level target allocations using the Target Allocation tile, showing more tax-driven information in the Gain/Loss tile, or displaying performance and holding details grouped at the product level, and so much more!

The Gritty Detective Drama

Road to Compliance

Even advisors with nothing to hide know how nerve-wracking it can be to find themselves facing down an SEC audit. Watch as Orion's Compliance app saves the day with organized records, routine mock audits, and scheduled queries that supervise firm procedures.

Not exciting enough yet? Compliance also screens clients to make sure they have no money-laundering history*.

Still want more? Inform, a critical Compliance co-star, monitors employee trade activities, affirmations, and disclosures to satisfy Code of Ethics obligations. Inform is available even to advisors who aren't on the Orion platform*.

(Catch up with the creators as they talk Inform; register for our webinar here)

The Star-Studded RomCom

Crazy, Awesome, Integrations

Meet Orion's ensemble cast of integration characters! Because we know that every business is as unique as its clients, we offer over 100 deep integrations with advisor favorites to help streamline operations, save time, empower company growth, and of course, strengthen client relationships. Talk about a modern love story!

Here are some standout integrations that have recently been updated:

- Junxure is a web-based CRM offering centralized client and financial information, workflow efficiency tools, comprehensive reporting, and document management
- Practifi is a solution built 100% on the SalesForce platform that combines all of an individual client's information into a single, unified view
- HiddenLevers provides risk applications and analytics to financial advisors, portfolio managers, and executive wealth management teams
- Asset-Map is a visualization tool that allows advisors to map, organize, and display client assets, liabilities, cash flows, and future projections, all on a single screen
- Redtail, a cloud-based CRM, empowers advisors to keep detailed records of client data, streamline workflows, and categorize and tag records for easy retrieval

Stay tuned for even more advancements coming to an Orion platform near you!

Not working with Orion yet? We'd love to start a conversation and show you what Orion can do for your business. Let us know here and we'll give you a call right away!

*Available at an additional cost.

0635-OAS-6/20/2019