

Orion Communities Offers Easy-to-Use Peer-to-Peer Model Sharing



First we brought you Eclipse™, and now Communities is on its way.

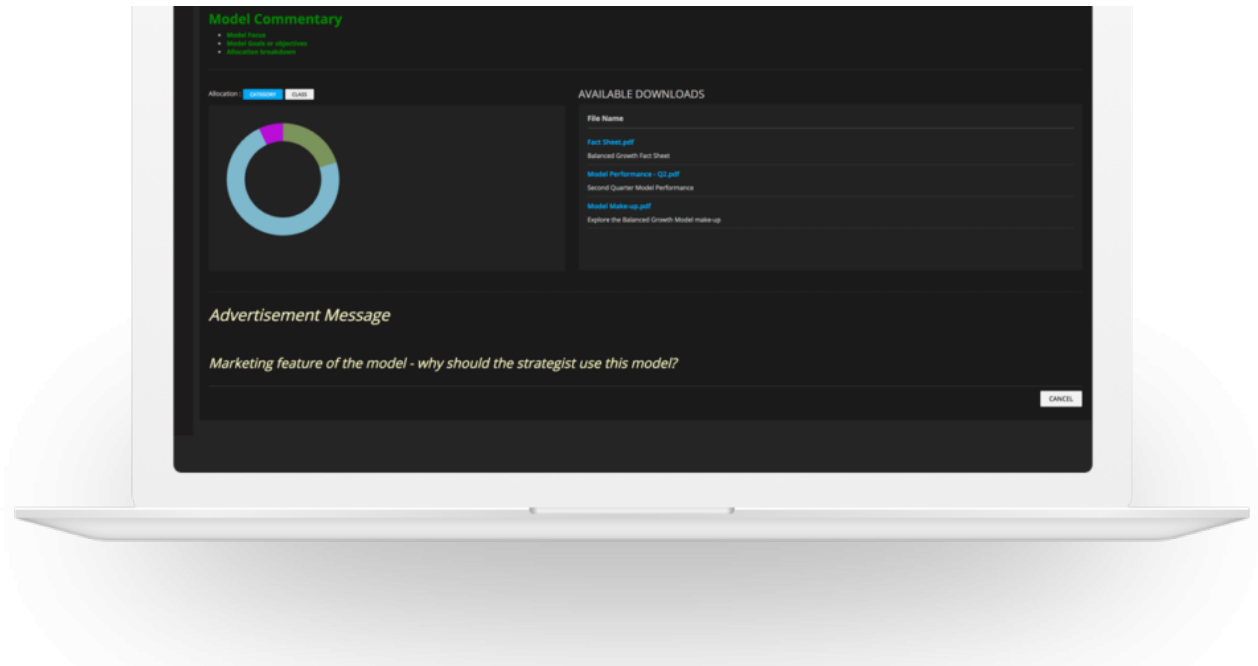
As part of our enhanced trading and rebalancing platform, Eclipse™, we just announced Orion Communities, an interactive peer-to-peer exchange. The new exchange is available for users of Eclipse™ and will be made available to TOM users later this May; it allows Orion clients to share model portfolios with each other in an open-source platform.

We're also excited to welcome world-class asset management firms to the platform as Strategists. They'll be sharing their own models, as well as portfolio building tools, marketing updates, and commentaries with the Orion advisor community. Many of those models will be offered at zero charge of Orion clients using Eclipse™. **See all the day one Strategists you can access here in our press release.**

There have been a number of model marketplaces announced in our industry in past months, but Communities is the only central marketplace that enables advisors and strategists to provide insight into their own investment strategies with each other, while still maintaining full control of the trading process.

COMMUNITIES FOR SUBSCRIBERS

The term "Subscriber" within Communities refers to any of the many Orion clients who will use the platform to find and add models to their practice. All trade review and execution is completed by the Subscriber, in accordance with existing trading processes.



Here's how to get started as a Subscriber to models available on the platform.

When a Strategist shares their models on Communities, they'll upload an agreement to the platform and Subscribers interested in the models will then sign off on the agreement and payment terms.

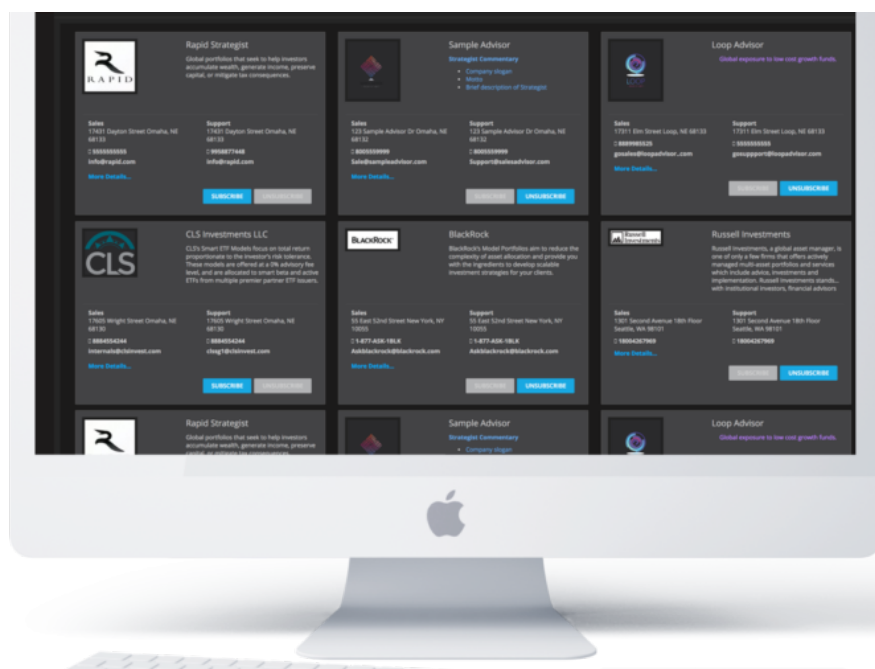
Once the Orion Community Terms and Conditions have been agreed to by your firm, you will be able to access Orion Communities via the "Link to Community Portal" link in both Eclipse™ and TOM. Once this page is accessed, you will see all available Strategists. From here, you can click "More Details" to learn more about any given Strategist and their available models.

COMMUNITIES FOR STRATEGISTS

Subscribers to Communities wouldn't have much to do without leading model portfolios to choose from after they sign up, and that's where the other side of Communities comes in.

Communities provides a centralized location where Strategists can market themselves, their strategies, and their allocations. Strategists can build and market any number of models on Communities and charge a fee to Subscribers for the use of those models.

Strategists will have the ability to rebalance models or change allocations, with trade requests sent to all applicable Subscribers. We've built Communities with an easy-to-use interface for Strategists to accomplish everything they need to do with the app's informative Dashboard.



The Strategist Dashboard view will show model metrics, without providing client information, including information like Assets Under Management, total number of accounts using allocations, and any incoming or outgoing cash flows from allocations. Many of the views can be filtered further to allow for more in-depth analysis of how allocations are being used.

If you're a Strategist, you'll need to have a place to show off the models you're offering. That's why we're giving you shelf space with a marketing page within Communities to post information about your firm. On this page, you can include relevant links, marketing material, announcements, and PDFs like recent commentary notes or downloadable resources for interested Subscribers.

How do Strategists get paid? We've thought of that too. Orion will assist Strategists in collecting billing contact information from Subscribers, and then make that information available to Strategists through Orion Communities. Orion is not responsible, however, for collecting fees on behalf of a Strategist. Strategists can use the information provided by Orion to bill the Subscribers to their models.*

For more information on how to become a Strategist, please email

OrionCommunities@orion.flywheelsites.com and include your name, firm and title.

Orion Communities is open to Orion customers through the Eclipse™ platform and will become available in the TOM trading app soon.

**Orion's system helps support payments, but Strategists are responsible for negotiating the terms and exchange of payments.*

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Looking for more information on Orion's trading system? Download our new white paper about how you can differentiate your firm with tax-efficient trading through Orion Eclipse™.