# Planning Is the Art

On a recent call, a large prospective client used four words to sum up what I believe to be our current industry's secret to driving growth.

"Planning is the art."

Planning is the art. Everything else can be systemized.

Think about that for a minute, especially in the context of the world today. If financial planning is the art, then you, the financial advisor—the artist—have the power to control the finished piece.

Your clients' financial goals are like warm clay in your hands. It's up to you to give them shape and structure, regardless of external conditions—such as market volatility and economic uncertainty.

In times like these, financial planning doesn't just help to keep your clients' goals on track. It also helps keep your clients themselves from making impulsive, reactive decisions influenced by a volatile market.

True art is not reactive. It's controlled, deliberate, purposeful.

We believe fiercely in the power of financial planning to improve outcomes for clients and drive growth for financial advisors—so much so that we acquired a robust financial planning platform last year. But that was just the beginning.

### We're Breaking Down Barriers

Connections, not boundaries, are more important now than ever before. We've always offered Orion Planning at no additional charge to our advisors, but with the COVID-19 pandemic turning financial planning into a necessity, not a nice-to-have, we saw the opportunity to help other advisors and their clients. As part of our Business as Usual program, we're currently offering our planning platform free of charge to *all* financial advisors so that they have the tools they need to better guide their investors.

The benefits of planning can't be overstated, especially during times of crisis. But even under normal conditions, research indicates that clients with a formal financial plan were seven times happier than those without one*. That has the very real possibility of turning into seven times the loyalty, or seven times the number of referrals—both of which can drive growth for advisors.

## We're Helping Planning Drive Prospecting

It follows that if financial planning is your firm's art, you should lead with it when you're trying to acquire new clients. But what we've found is a serious disconnect between the value of financial planning and the ability of firms to promote and capitalize on those services. In fact, 70% of advisors with financial planning tech don't serve plans to their clients**.

That's a missed opportunity for advisors and clients alike. So we set out to create a cohesive, streamlined experience that marries thoughtful planning-driven campaigns to intuitive workflows within Orion Planning. We added best-in-class marketing execution technology, and Market*r—the industry's only advisor marketing platform designed to drive engagement specifically through planning—was born.

## We're Building a Connected Client Experience

One of the biggest benefits of financial planning for you as an advisor is its ability to tie progress toward client goals directly to your investment decisions. When clients see and understand that connection, it enhances your value to them.

That's not all. Being able to visualize progress toward goals alongside investment data—and being able to access that information whenever they want—creates a cohesive, satisfying client experience. Our modern Orion Planning portal puts that experience right into the palms of clients' hands, and we're launching an initiative to transition all Orion clients to that new portal experience.

As a financial advisor, you're the artist. Orion has the tools and solutions you need to systemize your operations so that you can focus on sculpting your clients' financial futures.

Ready to learn more? Get in touch with us today!

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https://www.fidelity.com/about-fidelity/institutional-investment-management/fidelity-finds-number-of-tech-savvy-eadvisors-has-grown

**2019 Orion Client Data

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