

Power Your Firm's Growth with Practifi's Integrated Industry Solution



Your clients' financial goals don't exist in a silo. They're constantly influenced, mitigated, enhanced, and tempered by a number of other factors, including:

- Risk profiles
- Cash flow
- Assets
- Debt
- Insurances

To truly understand the way the elements of your clients' records work together — and to be confident that you're making the best financial recommendations for them — you need access to accurate, up-to-the-minute data. And you need a clear way to visualize those connections.

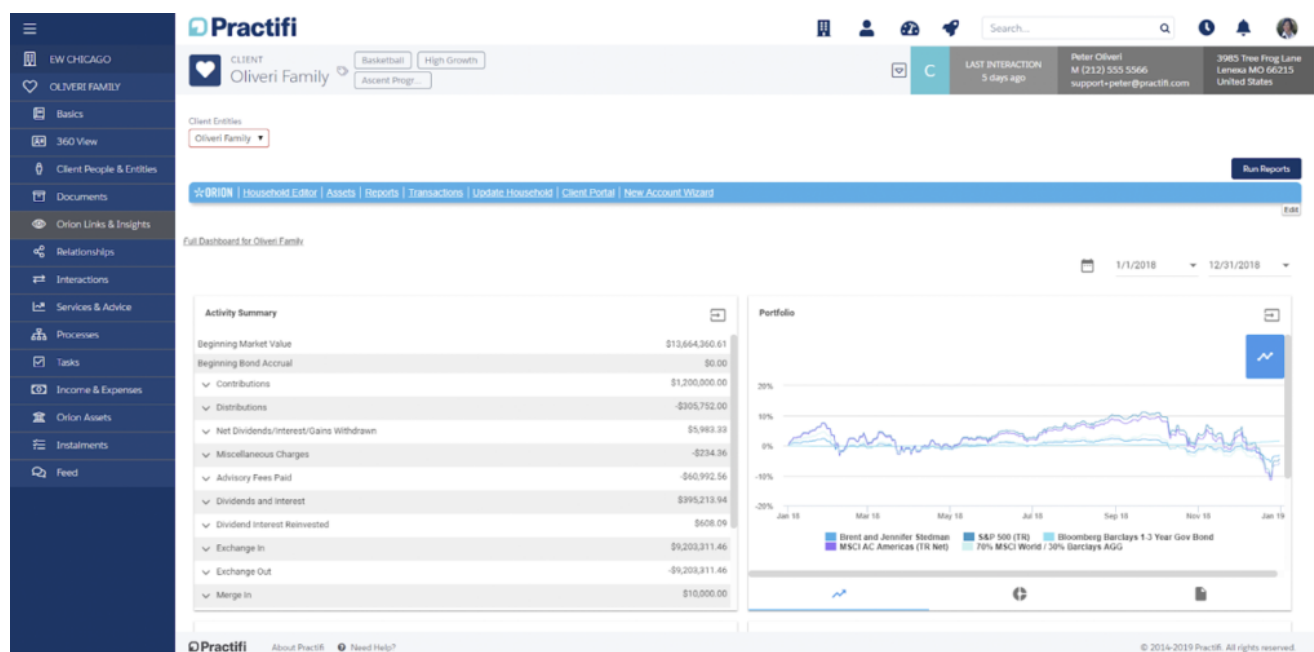
Enter Practifi, an integrated industry solution built 100% on the Salesforce platform. Practifi combines all of your client's information into a single, unified view, giving you the ability to strengthen your client relationships, improve your firm's efficiency, and ultimately, help your business grow.

Now consider all of those benefits, *plus* the added convenience and transparency of an integration with Orion.

Too good to be true? Nope.

When Practifi joined forces with Orion in early 2019, the integration gave advisors new visibility into account performance. Data flows between the two

systems in real time ensure your information is always up to date and keep your client and asset records in sync with Orion's Households and Accounts.



What does the integration really look like for you, the advisor? It allows you to:

- View Orion accounts and holding information from the PractiFi Client record within the Practifi platform
- Summarize account performance inside an Orion Insight dashboard tile
- View real-time Practifi account details in Orion Connect
- Access more household information and features with contextual links through the Orion Links navigation bar in the Practifi platform

By integrating with Practifi, Orion empowers you to give your clients the holistic financial advice they deserve — backed by the confidence that your data is accurate and up to date.

Want to learn more about how this integration can help improve your client relationships and drive growth at your firm? Check out our fact sheet [here](#).

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!

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