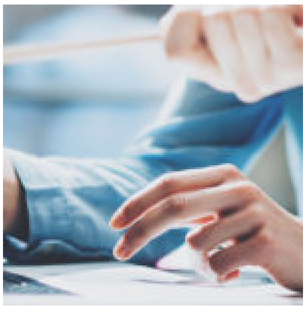
Properly Sync Client Accounts to Get the Most from Eclipse™



Properly Sync Client Accounts to Get the Most from Eclipse™

Within the Orion system, it's important that your accounts are properly synced with Eclipse™ trading so that you can take advantage of tax loss harvesting opportunities and reduced trading costs. In this week's Tech Tip, we'll show you how to check if your accounts are properly syncing, so you can help your clients get the most from what they've saved.

What?

As robo-advisors have grown in popularity, advisory fees have lowered across the industry. In order to demonstrate the increased value you bring to your clients, it's important that you provide services beyond just investment advice. One way to do this is through your approach to portfolio management.

According to recent data, around 80% of advisors manage portfolios in-house, and over 60% use a trading platform to help. Orion's tax-intelligent trading and rebalancing platform, Eclipse™, provides you with tax-efficient, automated features to positively impact your clients' portfolios and your back-office operations-without compromising one for the other.

Why?

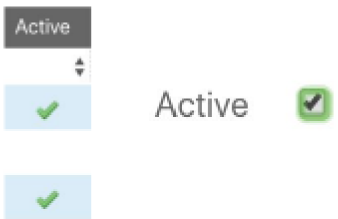
As you begin to use Eclipse™ trading, you may find yourself with a database issue where it appears that your accounts aren't syncing or they have been deleted all together. It's likely that you may have made a few changes in Orion Connect and affected your data sync. Let's take a look at some of the most common issues that may be affecting your accounts syncing up in Eclipse™ trading.

How?

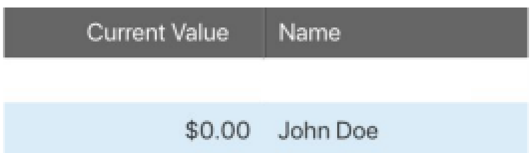
Here are a few of the most common steps that can be taken, or reviewed to confirm an account is syncing to Eclipse™ trading:

1. When editing an Account, under Options, has the Account been "Eclipse™ Enabled"? Accounts must be enabled to sync to Eclipse™.

1. Is the Account marked as Active in Portfolio Audit? Only Active Accounts will sync to Eclipse™ trading.



1. Does the Account have a value greater than $0.00? "zero value" Accounts will not sync to Eclipse™, regardless if the Account is Eclipse™ Enabled and Active.



If you need help getting started with Eclipse™, feel free to contact the Trading Team at trading@orionadvisor.com

Want to learn more about Eclipse™ trading? Join our upcoming demo September 3rd for a walk-through with our team of Orion experts!

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