Research Holdings With Orion's AdvisoryWorld Integration

One of the ways advisors provide additional value to clients is through their access to expertise and knowledge not available to common investors. For many, this includes fund research, identifying ways to properly construct a portfolio for tax efficiency and balanced allocations to fit a specific risk profile, and understanding detailed statistics for selected funds. All of these ways that you can dive deeper into a client's portfolio should be treated as advantages that help you fulfill your fiduciary responsibility and enhance your relationship with clients.

When you need to take a deeper look at data, you have multiple ways to do so in the Orion platform. One of the best ways to get the data and insights you want is to hook up an integration that will give you additional insights. Orion facilities an open integration infrastructure so you can select the best experience for your advisory firm, regardless of the other software solutions you've chosen.

In today's post, we'll look at one specific integration that can help you perform deeper research and analysis into your holdings. Let's take a look at how an integration with AdvisoryWorld can help you incorporate deep data insights into your Orion reports.

How the Orion AdvisoryWorld Integrations Creates More Meaningful Conversations

If you employ model portfolios at your firm, have you ever had a client ask you why a specific fund was selected as part of their portfolio? Or maybe you've had a client read a blog post from another advisor that came across their Facebook feed and they wanted to know what you think of bond ratings and their importance for the bonds you have them invested in.

When you have the right research tools at your disposal, none of these questions have to catch you off guard.

AdvisoryWorld allows you to have deeper conversations with your clients about the reasoning behind why a given diversified fund was selected for a specific portfolio. With AdvisoryWorld integrated into your Orion platform, you gain the ability to use Orion reporting to clearly illustrate your investment process.

Here’s a few of the ways that an AdvisoryWorld integration can augment your Orion reports with additional insights.

With the integration enabled, you can demonstrate fund allocation and total portfolio allocation, as well as trailing and forward looking performance. This type of analytical information along with the integration’s financial planning reporting capabilities can help you demonstrate to clients why your approach to long-term investing is still the best practice, even when markets are volatile and some get scared and want to pull all their money out.

An integration with AdvisoryWorld also lets you demonstrate diversification from a domestic and global standpoint. All together, these features allow you to speak to portfolio make-up for risk statistics, equity properties, fixed income properties, and yield.

When you give allow AdvisoryWorld access to all the client portfolio data you store in Orion, it can become your all-inclusive fund research tool.

AdvisoryWorld Subreports in Orion’s Reporting Suite

Integrating AdvisoryWorld with Orion has advantages beyond the additional analytics the integration allows you to discover. You can also create more comprehensive reports that include the ability to report granular portfolio allocation and fund information based on AdvisoryWorld’s research capabilities.

One of the most popular ways to use AdvisoryWorld’s integration is to add subreports to a custom Orion Report Builder report.

You can choose from a total of ten sub-reports that will pull in deep insights from AdvisoryWorld into your Orion reports, including an AdvisoryWorld HoldingScan report, as well as detailed analytics of performance and a Monte Carlo simulation of your selected portfolio.

But reporting power isn't where the integration ends; it's where it begins. As one of Orion's longtime integration partners, we've built a close relationship with AdvisoryWorld and you can enjoy the benefits of their integration throughout the entire Orion platform, even from the time you begin working with a client.

New households and accounts captured by AdvisoryWorld's Proposal platform can be created in Orion's New Account Center for review and management, giving you a seamless process from proposal to client.

Additionally, you can incorporate features from AdvisoryWorld into your Orion Client Portal, and you can enjoy Single-Sign On into AdvisoryWorld directly from Orion Connect.

What AdvisoryWorld Offers Advisors

Before we wrap up today, let's end with a brief look at all that AdvisoryWorld does for advisors.

Some of AdvisoryWorld's core services and features include Asset Allocation, Portfolio and Investment Analysis, Proposal Generation, Hypothetical Illustrations, Workflow and Document Management, and Financial Planning Software Applications.

The AdvisoryWorld platform allows advisors to optimize portfolios and analyze risk metrics that will, in turn, help them better manage risk. Their system also utilizes several Modern Portfolio Theory statistics such as Alpha, Beta, R2, Sharpe Ratio and Correlation.

You can get started with AdvisoryWorld right now. Reach out to our SME Integrations Team in Orion Social now to ask about starting your AdvisoryWorld integration. AdvisoryWorld is an Orion Tier 1 supported integration, so you can sign up through Orion and receive basic support for their system through your Orion support team as well.

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