

# Ring in the New Year with Randy



Happy New Year! Like many, I am looking forward to the year ahead—both personally and professionally. I know 2019 will bring more opportunities for travel, more time to spend with my family, more chances to connect with Orion's amazing client base and more platform innovation to help you earn your fair share of new business!

But as I look forward to what's ahead and the exciting work yet to be done, I can't help but reflect on what has brought Orion to where it is today. In 2018 I had the pleasuring of celebrating my 25th working anniversary with Orion and I've never been more invigorated by our clients' dedication to disrupt the status quo and innovate beyond traditional ways of thinking.

At Orion, meeting the shifting needs of our client base in 2018 wouldn't have been possible without the proven processes we follow and our best-in-class technology produced by the growing team following an inspired purpose.

So, as we embark on the new year ahead, I'd like to share some of the most exciting moments and memories from 2018:

## **A Team of People with an Inspired Purpose**

Over the past 25 years, I've seen Orion grow from a handful of passionate innovators to a thriving team of 360+ talented and diverse employees. Everything Orion has achieved to-date has been driven by this highly structured and robust community that is motivated by our mission and core values. In 2018 our team placed a significant focus on creating more ways to build even stronger partnerships with our clients and the industry. For me, perhaps two of the most exciting achievements towards this goal have been:

## *1. Re-Calibrating Our Mission with Client Partnership in Mind*

This past year, we took a step back to not only consider where we'd like to take our organization in the years to come but also, how we could best meet the needs of the industry. After thoughtful discussion and reflection, we unanimously determined that nothing drives Orion more than winning! We believe advisors win through technology and experiences that empower them with the freedom to be successful and independent fiduciaries. That's why we've made it our promise to develop forward-thinking capabilities and services that in turn, can help advisors *and* their clients win for years to come.

## *2. Establishing & Expanding New Teams*

Before heading into 2018, we knew that in order to help us build stronger partnerships, we needed to expand two teams within our organization: Marketing and Strategic Consultation. In order to get the word out about all that Orion can do to help firms win, we needed a powerhouse team of marketers which lead us to Kelly Waltrich, our CMO, and opening an office in Philadelphia, PA to house the new talent we were bringing on. We also restructured and added significant resources to our Strategic Consultant team led by Joe Leybolt, whose primary focus is providing hands-on support to help our clients find new and better ways to leverage our technology. I can't wait to see the continued impact these resources will have on Orion in 2019!

## **A True Partnership Approach to Our Processes**

□Over the years, Orion has learned that the most successful firms follow a similar process when it comes to unlocking their potential. In 2018, we not only formalized this blueprint for success, establishing a long term-foundation with every new client we brought on, but we also celebrated with many clients who saw the rewards of our partnership:

*"With the ability to customize our mobile experience and integrate outside data, we have built an app that our clients actually like and use."*

-Craig Love

Fulcrum Equity Management, LLC

*"Orion has done a great job of helping us automate tasks that we had to previously do manually. This frees up time for portfolio construction, client retention, and prospecting".*

-Greg Mattingly

Preston Wealth Advisors, LLC

*"I've been in business now for over 30 years and have not worked with a company who has been able to deliver on what they have said to the degree Orion has."*

-Ron Thompson

Smart Portfolios LLC/Thompson Business Group

I am so grateful we have so many amazing clients who share the same passion and dedication for winning in their business. As we continue to follow this blueprint into 2019, I am confident we'll help even more advisors and firms unlock the gateway to unlimited potential!

### **Best-in-Class Technology That Keeps Innovating**

Our business' core focus is on our technology and ensuring it is built to help support your client relationships, manage portfolios effortlessly and run your business better. We place a commitment on excellence which has driven the development of some of the industry's most forward-thinking capabilities and services. In 2018 we re-envisioned and launched these major innovate solutions:

*Eclipse™ trading:* It's no secret that advisors are being tasked with more initiatives than ever, so we created Eclipse™ trading to simplify operations with faster trade processing, Household Level trading, and automated workflows. What's more, Eclipse™ trading was built to scale trading and rebalancing procedures with key features like block trading and en masse order execution.

*ASTRO:* Before ASTRO, the high costs and massive time commitment associated with building highly customized separately managed accounts (SMAs) prevented financial advisors from bringing these capabilities to clients. The powerful technology fueling ASTRO empowers advisors to accomplish this in minutes — and at a fraction of the cost.

*Compass:* By maintaining compliance data in-house — instead of stacking compliance solutions from third-party providers — firms can now eliminate outsourcing costs while reducing the possibility of a data breach. Leveraging the data already maintained in Orion Connect allows firms to efficiently and proactively identify potential Code of Ethics violations or confirm compliance.

*AIP:* Creating a holistic view of traditional and alternative investments has historically been a challenge for advisors. AIP provides advisors with a way to

manage their high net worth clients' traditional and alternative investments — such as hedge funds, art, etc. — in a single comprehensive platform for a full accounting of their wealth.

I have no doubt that in 2019, you'll be seeing these and our other solutions continue to evolve and push the boundaries of innovation, efficiency and scale in our industry.

I truly love what I do, the team we have and the clients that we get to work with. If 2018 is any indicator of where we're heading into 2019 and beyond, I am confident amazing things are on the horizon for our advisors and industry!

Don't Already Work with Orion? Let's connect on how we can help you win in 2019!

**0702-OAS-12/31/2018**