

Six Can't-Miss Ways to Catch Orion at Schwab IMPACT



Schwab's IMPACT 2019 conference is right around the corner.

From the stunning San Diego locale to the agenda packed full of industry rock stars, the appeal of this event is endless — and can be endlessly valuable to you as an advisor. But with so many options — over 100 sessions and more than 300 exhibitors — your calendar is going to book up fast.

Want to start planning your agenda now? Here are six ways you can catch up with Orion Advisor Tech at the conference:

During the Day

Book your spot at our Tech Lab on Monday, November 4 at the Kimpton Solamar Hotel.

Meet one-on-one with a member of our Subject Matter Expert team. Take a deep dive into your biggest business operation challenges, learn how to best leverage your technology stack, or just check out the latest Orion innovations and see how they can help you grow your business.

But don't hesitate. Time slots are limited and available on a first come, first serve basis, so register now!

Join our CEO Eric Clarke on Tuesday, November 5, at 10 a.m. for his presentation on the power of technology for newly independent advisors.

Often, breakaway advisors simply don't know what they don't know. But with so many advancements in advisor technology, they're poised to accelerate the

growth of their new businesses with the right tech in place. In this session, you'll hear from three breakaway firms who leveraged technology to scale and power their firms.

Don't miss our President of Financial Planning, Hussain Zaidi on Wednesday, November 6, from 4:00 p.m. - 4:30 p.m., for his presentation on Orion Planning Powered by Advizr.

In today's industry, it's becoming increasingly critical for advisors to deliver value to their clients through a financial planning experience that holistically considers goals, resources, and time horizons, coupled with investment performance.

Marrying Advizr, a comprehensive financial planning engine, with Orion's powerful technology creates the foundational data and client transparency necessary to foster meaningful conversations about progress and opportunities, thereby improving the client experience overall.

Join Orion's team of experts all conference long at our megabooth, #219.

Want to learn more about ASTRO, catch a demo of our new financial planning platform, or chat one-on-one with a member of the Orion team about how you can make the most of our technology?

Stop by anytime throughout the conference! We promise you'll leave with plenty of innovative ideas to help your business win—and some sweet Orion swag too!

After Hours

RSVP for our FUSE party, held November 5 from 9-11 p.m. at PARQ San Diego restaurant and nightclub.

We can't oversell this: last year, the rooftop bar, breathtaking views, and make-you-move beats drew a standing room-only crowd.

And alongside co-hosts FIX Flyer, Redtail, and Hidden Levers, we're poised to top last year's event with a one-of-a-kind nightlife experience set to the backdrop of the booming Gaslight District.

Make sure you get in. Sign up here!

Get hyped before the OneRepublic show at Petco Park!

From 5:30 – 7:30 p.m. on November 6, you can start the final night's party a little early with Orion's very own George Svagera at Half-Door Brewing Company, conveniently located only one block away from Petco Park.

Innovative Schwab User Updates

But that's not all — no, really. At Orion, we're committed to upping our game and putting our mission into action by consistently improving your advisor tech platform with innovations that unify, streamline, and scale the critical back-office tasks you need to run an efficient, successful firm.

Before the conference, check out a sneak peek of our recent, game-changing enhancements for Schwab users:

Change of Address

For starters, we want to help give advisors their time back by eliminating inefficiencies and preventing unnecessary duplicated manual processes. Our new change of address feature accomplishes just that: an advisor changing an address in Orion's Portfolio Audit Editor will be prompted with "Do you want to submit this address change to Schwab?" (provided the household in question has a Schwab account).

The checkbox for "Yes" is populated automatically, and upon clicking "Submit," the address change will be made in Orion and submitted to Schwab.

Support Tickets

But we don't just want to make things easier for advisors: we want to make sure they have the answers they need, when they need them. Getting to the root of any problem quickly helps improve efficiency and keeps your firm running smoothly. With our new support ticket function, we've simplified the process of submitting help tickets to Schwab: advisors are now able to submit help requests tickets for Schwab from within the Orion platform. The advisor can provide their name, body text, and attachments to add further detail to the request, and an on-screen message will indicate that the request has been submitted successfully.

In case you couldn't tell, we're so excited for Schwab IMPACT, and we can't wait to see you there. Ready to get started now and see how the latest innovations from Orion can impact your business? Get in touch with us before the event to learn more about working with Orion. Contact us today.

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