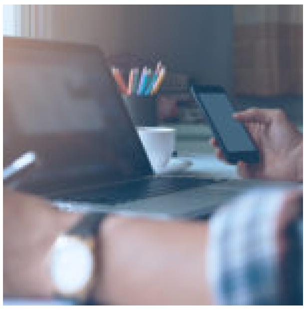
Streamline Your Firm's Account Opening and Custody Process with Orion + Apex Clearing



The account opening process has long been a pain point for many. Yes, steps have been taken to simplify and streamline that process, but there are still hurdles in place to slow things down, limiting your efficiency.

If only there were a way to have your clients open accounts on their own, in minutes, with a wonderful user experience that enhances your firm's brand reputation. Wouldn't that be nice?

That's why we've partnered with Apex Clearing, a clearing and custody engine, that takes all the pain out of the account opening and funding process. That way, clients can open and fund accounts in a matter of minutes thanks to the features of a robo custodian, while you can focus on providing the service and advisement they have come to expect. Plus, it's all done in Orion's robust client portal.

When you're vetting a new custodian, here are some features that set Apex apart from the custody and clearing crowd:

Client-Driven Account Opening

Apex has simplified and streamlined the account opening process so that a client can complete it on their own in minutes. When they are finished providing their personal information needed to open the account, clients check a box constituting their signature, saving time and hassle in the process.

When they have their account opened, they can link their existing bank accounts to the new investment account right through the client portal, allowing them to transfer funds in seconds.

Connectivity

When a client opens and funds an account in their client portal, that information is sent to Orion Connect’s New Account Center, where you can add that account to the client’s overall asset allocation and manage those investments accordingly. Assets will be shown on the advisor dashboard so you can provide the same level of advisement as you would any other investment.

Built-in Branding

When a client goes to open or fund an account, the word Apex never appears. Rather, the client will see only your white-labeled client portal, which can build on the rapport you already have with your clients by offering them the ability to act on their own terms.

Do you think the Apex integration with Orion could make a difference for your client? Sign up for our Apex integration webinar, which will be August 6 at 2 p.m. CT. Or, reach out directly for more information.

Current Orion users: Contact integrations@orionadvisor.com or 888.695.0523

Not already using Orion? Contact empower@orionadvisor.com or 402.496.3513

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