Tech Actually: An Ensemble Cast of Lovable Advisor Solutions

□ Ugly sweaters are back on trend.

□ Sugar is the top, middle, and bottom of the food pyramid (with guest appearances by butter and flour).

□ Commercials are either devastatingly sad or infuriatingly catchy, but definitely running on an endless, inescapable loop.

Yes, the holidays are here.

How else can we tell? Holiday-themed movies have taken over every possible cable channel and streaming service.

And much like the ever-growing catalogue of holiday movies available for your binging pleasure, Orion's tech solutions continue to grow exponentially, too. Our cast of characters is always expanding, based on feedback from our advisors and a desire to innovate that keeps us on the pulse of industry trends.

So in the spirit of the holidays, check out some of our favorite additions to the Orion solutions family this year.

ASTRO and Eclipse™: The Couple That Finally Got it Right

The foundation of every great holiday movie (okay, every great holiday movie *on Hallmark*, which might be an oxymoron) is the couple that you just know is supposed to be together in the end.

Enter Eclipse™ and ASTRO, the golden couple of the trading world. Clearly made for each other, our SMA optimizer and tax-efficient rebalancer have had quite a year. Their August marriage gave advisors with ASTRO-enabled accounts access to five predefined direct indexing models, each with a specified buy list, number of securities, tracking error, and more, all for immediate use within Eclipse™.

And right on the heels of the Eclipse™/ASTRO union came what might have been the industry's biggest revolution this year: the announcement of zero-commission trading. Eclipse™ and ASTRO had already opened the door for advisors to offer direct indexing to their entire book of business by streamlining a once-unwieldy, inefficient process into a single platform. Now that Schwab, TD Ameritrade, and others have dropped trading costs to $0, it's become even more cost-effective for advisors to create direct-indexed, custom SMA portfolios.

In the new year, look forward to even more efficiencies, greater advisor alpha, and stronger client relationships as a result of the Eclipse™/ASTRO connection.

Payout Dashboard: The Sidekick

No holiday movie hero gets the job done (whatever the job may be — navigating through the Candy Cane forest, convincing Mom you won't shoot your eye out, one-upping your neighbor's festive outdoor display) without help, or at least a modicum of support, from a trusty sidekick.

If Billing is our hero, the new Payout Dashboard is its indispensable sidekick. At Orion, we've long offered an automated process for creating custom payout rates, saving advisors the time and tedium of doing it themselves in Excel. But the Payout Dashboard takes that efficiency even further, providing unprecedented visibility to entities (e.g. rep and RIA) that receive payouts and unparalleled access for firm admins to track, edit, and report payout information.

The Payout Dashboard provides complete transparency into each account's money breakdown, answering three critical questions:

- How much money is each stakeholder receiving?
- Why that amount?
- When are those payments posted?

To learn more about how the payout dashboard can help you improve transparency and efficiency in your firm, check out our blog post here.

Advizr: The Plot Twist

Just when everything seems to be proceeding as planned — presents are wrapped, lights are shining, the egg nog is flowing — something comes along to disrupt the status quo. In the case of a holiday movie, it's typically an unexpected relative showing up for dinner, or nine reindeer crash-landing in Central Park.

For Orion, that plot twist was the acquisition of Advizr.

In order to respond to our advisors' greatest needs — opportunities to showcase their value, tech their clients actually want to use, and ways to demonstrate a connection between client goals and the investment strategies used to reach them — we joined forces with Advizr, a robust financial planning platform with a next-generation client portal.

Research indicates that planning-led relationships drive better outcomes for clients and greater AUM for advisors, along with increased client loyalty. Planning also opens the door for more meaningful client-advisor conversations by including long-term goals and empowering advisors to show the process behind choosing investments to support them.

Interested in implementing financial planning at your firm? Learn more here.

Event-Based Notifications: The Anti-Scrooge

In almost every holiday movie, there's a character you love to hate: grumpy, unpleasant, and generally miserable about the holiday season (until the lovable lead comes along and changes their entire holiday outlook in 90 minutes or less).

Orion's anti-Scrooge is Event-Based Notifications: the client experience tool you'll just love to love.

Event-Based Notifications automate and streamline the creation and delivery of text and email communications. What's more, they can be easily customized, helping you curate deeply personal relationships with every client.

Using Event-Based Notifications makes celebrating individual client milestones, such as birthdays and anniversaries, as simple as switching the notifications on. Client data will pull from Orion Connect to ensure the message you want to send is ready to deploy on the correct day.

But Event-Based Notifications go beyond celebratory events to help keep your clients informed about important portfolio updates, like rebalances and trades, as well as critical alerts such as RMD, capital call schedule, and distribution schedule.

Want to make the most of Event-Based Notifications? Check out four best practices here.

Integrations: The Guest Stars

Re-watching The National Lampoon's Christmas Vacation for the first time in years was like getting one virtual gift after another: Hey, it's Elaine from Seinfeld! And that's Leonard from The Big Bang Theory, only smaller and less nerdy!

It's exciting when your favorites show up in unexpected places. And at Orion, we integrate with hundreds of them, so you can create the tech stack that helps you operationalize your unique vision for success — no compromises required.

Some of our most recent integration updates include:

Experian: Orion's integration with Experian gives adults in the same household access to online identity and financial account monitoring services, in addition to credit score monitoring. You can access these services from both the Orion and Advizr client portals.

Schwab: Great news if you custody with Schwab; you can now submit change of address and service requests to Schwab directly from Orion, eliminating the need to toggle between two systems.

factorE: Using Orion portfolio data, factorE can assess the risk held by a portfolio and apply that allocation to a factor-based scenario analysis (including past events, such as the recession of 2008).

Salesforce: A single-sign on from the Orion Client Portal to the Salesforce Community Cloud improves efficiencies when you need to work in both systems.

Benjamin: Digital assistant Benjamin helps with tasks like scheduling meetings through your CRM and running Orion reports ahead of those meetings so that you don't have to. Less tedious manual processes, more guaranteed preparation? Cheers to that!

During the holiday season and all year long, we're grateful for the opportunity to do what we love by helping you do what you love. We wish you a safe and happy holiday, and we're so excited to see what we can accomplish together in the new year!

Is Orion on your holiday wish list? Contact us today to schedule a demo and get started operationalizing your vision for success!

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