

# Get Started on Orion's Financial Planning Software Powered by Advizr



ICYMI: Advizr's disruptive financial planning software and client experience technology is now available at no extra cost as part of Orion's signature technology platform. The added offering allows advisors to deliver a next-level client experience that ultimately helps your firm stand out in a crowded industry.

We want to make sure you get the support you need to make the absolute most of this amazing tool, so we've put together this four-step guide of what it looks like to get started using this feature:

## 1. Identify Your Team

To ensure the best possible experience for our advisors and your clients, we are rolling out Advizr to interested firms in stages. To reserve your spot, you will need to complete some initial steps. The best way to stay on track is to identify a primary contact at your firm and any other members of your team you would like to have participate in the onboarding process.

Having a single point of contact who owns the process at your firm increases the efficiency of the onboarding process. Our Financial Planning team will coach this person so they will be able to train the rest of your team members who will be using the software.

## 2. Do the Training

The next step is to have your onboarding team complete our Ascent Training modules on Advizr. To access the courses, click on the "Ascent" tile within Orion

Connect, then click on “Course Catalog” at the top right of the screen and select the “Financial Planning Catalog.”

These courses must be completed and the exams passed before we can reserve a spot for your Advizr onboarding. We recommend working with your designated go-to person to help ensure the training is done in a timely manner.

### **3. Participate in Onboarding**

Once you complete the first two steps, your firm will be added to our Financial Planning team’s list of firms ready for a future roll-out. Our team will ensure all interested firms are onboarded as soon as possible.

When your firm is scheduled to roll-out, our Financial Planning team will reach out to your primary contact to begin your onboarding and provide you with additional training.

### **4. Redefine the Client Experience**

Once you have completed the onboarding phase, you are ready to leverage Advizr’s iterative financial planning software capabilities to redefine your client experience and grow your firm. In fact, according to McKinsey & Company, businesses, including advisory firms, focused on the customer experience and digital transformation strategies have a revenue growth rate five times greater than those that don’t.

Ready to get started on Advizr’s financial planning software? Sign up to reserve a spot with one of our implementation team members.

*Orion Advisor Technology, LLC and Advizr, Inc. are affiliated companies through their parent company Orion Advisor Solutions, LLC.*