



Thanksgiving (Sound) Bytes: Five Reasons We're Thankful This Year

All year long, we're thankful for the ongoing support, collaboration, and loyalty we receive from our wonderful partners. It's a gift to work with such talented and forward-thinking financial advisors, and we're so grateful for the opportunity to inspire your passion for your clients with our passion for innovation.

In the spirit of Thanksgiving, we'd like to share with you some of our most motivating success stories: five *amuse bouches*, if you will, from firms who are harnessing the power of Orion's technology to grow their own businesses.

Warren Averett Asset Management

Headquarters: Birmingham, AL

Orion client since: 2012

How Orion is helping them grow:

"[Orion] allows us to leverage technology, whether it's opening accounts online, whether it's rebalancing and trading — all of these things that used to be really manual processes. Now we can do a \$100 million dollar trade like that. It's done," says Justin Russell, Chief Operating Officer.

Heath Echols, a Warren Averett advisor, adds that "We're using Orion to develop a more interactive client portal — one that our clients actually want to visit. We feel like they're going to help our client experience."

Monument Wealth Management

Headquarters: Alexandria, VA

Orion client since: 2017

How Orion has helped them grow:

Monument Wealth Management's president and co-founder, Dave Armstrong, explains that "Orion has afforded me the opportunity to be productive, communicate well with my clients, and execute trades in a very timely manner."

Armstrong likens technology to an artist's paintbrush. "You need to have the best tools available to make that piece of art on behalf of your client."

AE Wealth Management

Headquarters: Topeka, KS

Orion client since: 2016

How Orion is helping them grow:

AE Wealth Management grew by \$3 billion in 2018, half from new advisors and half from existing advisors on their platform.

"The growth has been driven by the simplicity of Orion, the user friendliness, and also by providing the client experience that advisors use to help grow their practice," says Patrick Malone, Platform Specialist.

Chris Radford, President of AE Wealth Management, adds: "Information is key to growth, and Orion provides that information at the advisors' fingertips. Could we do what do without Orion? It would be very, very difficult. I wouldn't want that choice. The folks at Orion are a true partner to us."

GW & Wade

Headquarters: Wellesley, MA

Orion client since: 2013

How Orion is helping them grow:

“When we started 33 years ago,” says Roger Wade, co-founder of GW & Wade, “there was no software, let alone Orion.”

Eric Rosenberg, Principal, points out that the firm previously had tremendous inefficiencies around their billing process. “Orion’s billing capabilities accommodate our massively complicated billing structure. I don’t know where we’d be without Orion.”

Wade adds, “What I’ve come to like most about Orion is the sophistication of the software and reporting.”

Buckingham Strategic Wealth

Headquarters: St. Louis, MO

Orion client since: 2016

How Orion is helping them grow:

“One of the biggest things Orion has done is help us on the acquisition side. It allows us to be more scalable, it allows us to provide a more integrated experience, which is a real win for the firms we acquire,” says Jeff Remming, CIO.

“Orion has also helped us evolve our client experience,” Remming continues. “The tool we use most is the Orion client portal. Our clients can log in and access their portfolios, as well as details of their financial plans. It’s really elevated what we can present to our clients on a daily basis.”

Without partners like these embracing technology to empower their growth and drive better results for their clients, our own growth would be impossible. We promise to show our gratitude through continued innovation with our advisors’ best interests at the forefront — today and all year long.

From everyone at Orion, happy Thanksgiving to you and yours! If you’d like to get in touch with our team, don’t hesitate to [contact us here](#).

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