

The Early Bird Gets The FORM ADV Data Worm



As 2017 draws to a close, we approach a new year full of possibilities. A year of love, joy, and prosperity. And for most Orion clients, it also marks that start of the most wonderful time of the year. That's right, ADV Update Season! That marvelous 90-day period where we all open our databases to see what the Data Elves left behind.

Have you been naughty or nice when auditing your data? What if the elves saw when you started using that one field as your own personal catch-all? Is that coming back to haunt you? Yes... yes it will.

December 31 marks the end of the fiscal year for 97 percent of Orion clients and kicks off the 90-day countdown to the end of ADV Update Season. For the next 90 days, compliance and operations personnel from across the country will be looking high and low to find the data they need to complete their annual update filing.

Stress levels are up, missing data columns are being sought, and occasionally all-night pizza parties are taking place. Such a frightening experience for just a few small morsels of data. Unless you are an Orion client.

Here at Orion we like to keep our clients stress free and joyful throughout the ADV Season. That's why we created the ADV Tab located in the Compliance Corner. With just a push of a button, Orion clients can retrieve the critical FORM ADV data they need to complete their filing.

It's nice being an Orion client, where you have the benefit of knowing that these numbers are available at your fingertip.

**For more information, contact Orion Compliance at
Compliance@OrionAdvisor.com.**