

The Future of Client Experience: Orion and Advizr



From Orion's inception, our goal has been helping you operationalize your vision.

We focus our product development on tools that empower our advisors to demonstrate their value by providing an exceptional client experience.

And as the digital world shifts, so do our advisors' needs. Consistently innovating means staying connected to industry demands and looking to our advisors to determine what we can do better.

Here's what we've learned: our advisors need to not only meet their clients' expectations, but also to surpass them with a sleek, seamless, empowering experience: one that stands out in the financial industry.

We heard from our advisors that they're looking for:

- Opportunities to showcase their value
- Ways to demonstrate a connection between client goals and the investment strategies proposed to reach them
- Technology clients are excited to use that doesn't cause extra advisor work

So we took that feedback and put it into action.

To turn our advisors' challenges into opportunities and wins, we searched for a solution that would help us redefine the client experience. On July 11, 2019, we announced our acquisition of Advizr, Inc., a financial planning and client experience technology platform.

Why Financial Planning

Offering a truly comprehensive client experience means thinking beyond the client portal. And research indicates that planning-led relationships are the future of our industry.

Planning drives better outcomes for clients — for example, high-net-worth investors who held to their financial plan grew their assets by 110% compared with those who didn't. It does the same for advisors who offer advice-planning services: they have higher AUM and compensation than those who do not*.

Financial planning changes the advisor-client conversation, opening the door to include long-term goals and allowing advisors to show the process behind choosing investments to support those goals.

Next-Level Planning Capabilities

Together, Orion and Advizr offer the tools to drive a client experience that's focused on both planning and investing:

- **Data Gathering:** Automated, streamlined, and standardized process for full data discovery that can be completed on a self-directed, advisor-driven, or joint live basis
- **Goal Setting:** Smart adaptive model applies cash flow or goal based planning depending upon client case complexity
- **Monte Carlo Simulation:** Enables users to interactively change inputs and see how those changes affect their financial goals over time
- **Next Steps:** Access insights needed to take action right within the application, putting your client's plan into motion
- **Client Portal:** Collaborate from start to finish — from lead generation, discovery, calibration, planning, goal setting, progress tracking, and ongoing client meetings

The Future of Client Experience for Advisors Using Orion

The juncture of Orion's best-in-class technology and Advizr's planning-led client experience gives advisors the tools they need to connect and collaborate with their clients while boosting satisfaction by exceeding their expectations.

Involving clients at the beginning of the investment process, instead of simply pushing out reports about their financial futures, empowers them by offering a

holistic view of their financial health, including their goals and the investment strategies that will help achieve them. Arming your clients with knowledge through total transparency increases both their trust in and connection with you.

The Integration Roadmap

Advizr will be folded into the Orion tech platform, and the integration with Advizr will roll out in phases, beginning with single-sign on and Asset Class Mappings from Orion to Advizr. The cost of Advizr will be packaged within Orion's existing per account fee**. Advizr's Advice-Driven Experience tool will become part of Orion's core solutions — similar to reconciliation, reporting, billing, and trading — meaning we won't be offering Advizr's solution as a standalone product.

For more information about how Orion and Advizr can help you deliver a best-in-class client experience, join our webinar, held August 2nd at 3 p.m. EST.

*<https://clearingcustody.fidelity.com/app/proxy/content?literatureURL=/9870983>.
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**Minimal data aggregation fees may apply.

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