

The Highlights You've Helped Us Create (So Far) at Ascent 2019



Ascent 2019 on the Road continues to exceed our expectations, thanks to the great advisors who have met us along the way. This year, our premiere user conference has taken us to Atlanta, Scottsdale, Chicago, San Francisco, Santa Monica and Boston. In each city, we have enjoyed meeting with advisors and gaining a better understanding of how we can support you with our innovative tech tools.

We would like to thank all of the advisors and our event partners who have helped Ascent 2019 exceed our expectations. And, for anyone who has not yet had a chance to attend, we are extending a final invitation that you won't want to pass up. Join us in Denver for our final Ascent event of the year! By attending, you will receive all the great insights that have made Ascent 2019 such a success. Plus, you will have a chance to attend the kick-off party for our recent rebrand announcement! It will be an opportunity for us to enjoy each other's company over food and drinks, and it will give us a chance to provide a deeper understanding of our company's core values. We're working to make Ascent Denver a truly grand finale. Don't miss out on the fun. Register at orionascent.com.

Want to see some memorable moments from our Ascent events in Atlanta, Scottsdale and Chicago? Check out this blog post. Then, read on for more highlights from Ascent.

San Francisco



A visit to the Golden Coast is an experience in and of itself. By bringing the Orion team of Subject Matter Experts to San Francisco — our popular one-on-one consultations along with an eye-opening keynote and a networking event aboard a

private yacht — attendees enjoyed an extraordinary experience.

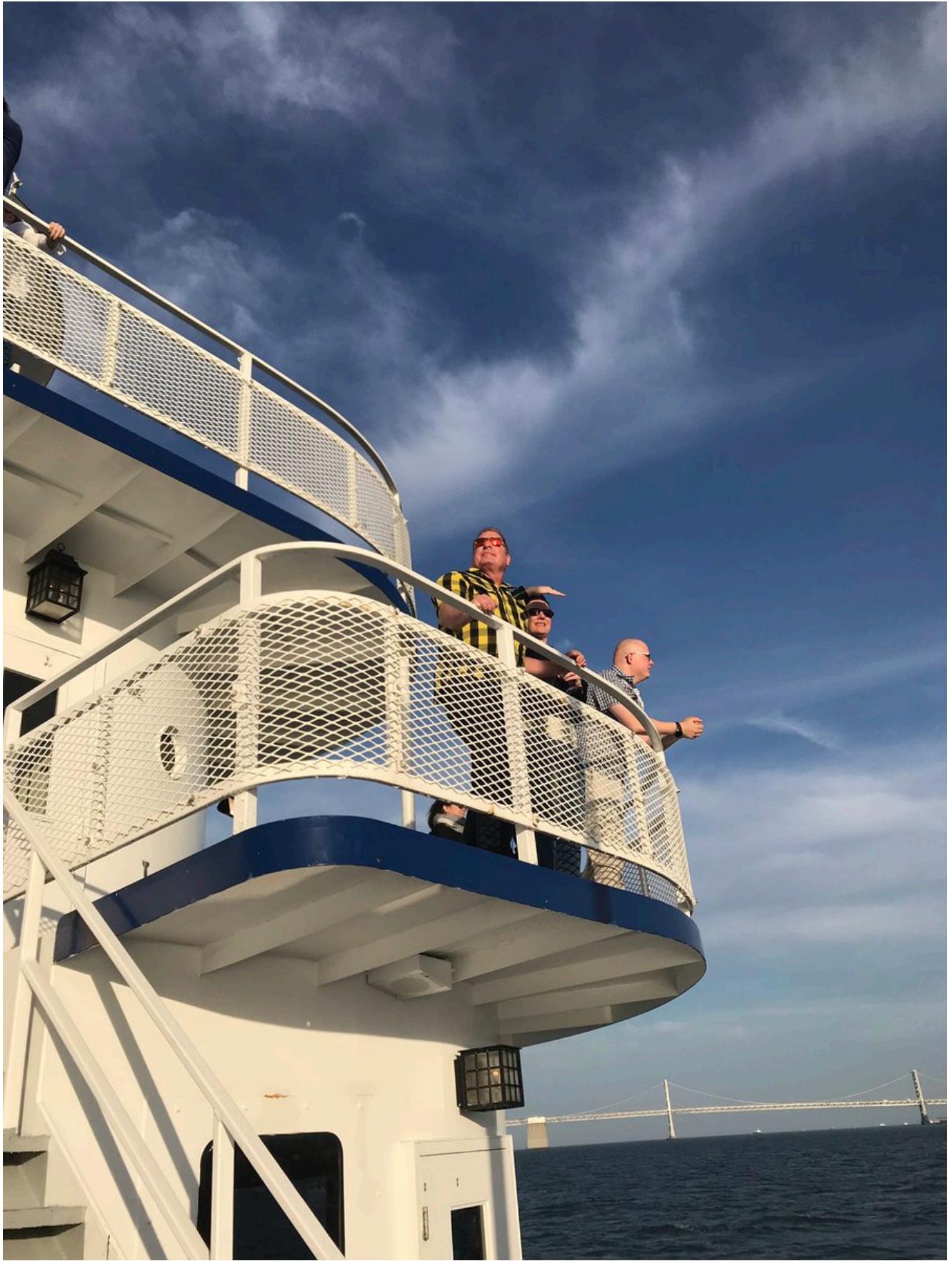


In San Francisco, we were joined by two event partners — Schwab and Risklayze. This unique opportunity provided Orion clients with the chance to hear from Schwab about the new Digital Account Open on Schwab Advisor Center, cybersecurity tools and more. Then, Riskalyze demonstrated the power of risk alignment, supercharging marketing efforts and the basics of building portfolios.



Advisors attended an inspiring keynote from Clara Shih, CEO of Hearsay Systems, a rapidly growing Silicon Valley advisor technology company. Clara's keynote "The Social Selling Revolution" provided valuable insight on how to use LinkedIn, Facebook and Twitter to transform the way firms acquire and engage clients.

The day wrapped up with an unforgettable networking activity—a private yacht cruise on the San Francisco Bay. Attendees enjoyed each other's company as they took in iconic sights including the San Francisco skyline, Alcatraz Island and the Golden Gate bridge backdropped by a breathtaking sunset.





Did we mention, that was all just day one? Day two featured more great sessions, one-on-one consultations and an opportunity to hear about the roadmaps of Orion, Schwab and Riskalyze. Our wonderful event partners, and all the advisors who attended, made Ascent San Francisco one of our most memorable events of the year!

Santa Monica

Our next stop took us south on the west coast to Santa Monica, Calif. This event took place at the offices of our partners, Dimensional Fund Advisors (DFA). Orion clients had an opportunity to meet with DFA and learn about their sophisticated research techniques and portfolio management practices. DFA also hosted a breakout session introducing advisors to their firm and another session discussing benchmarking and investor surveys. All in all, a lot of valuable information was shared by one of our most valued partners.



Another highlight of Ascent Santa Monica was an inspiring keynote from two incredible speakers - Craig Iskowitz, Founder and CEO of the Ezra Group, and Kristen Schmidt, Founder, Tech Strategist, and Consultant of RIA Oasis. Craig and Kristen presented a master class in evaluating financial advisor software. Advisors learned best practices for ensuring their firm is aligning with the best possible tools and partners.



After a jam-packed day, Ascent Santa Monica attendees capped off the evening by unwinding and networking at an informal social gathering. It was a great opportunity for advisors to expand their circle of influence with other financial

professionals in their region, and a great way to wrap up our visit to beautiful southern California.

Boston



Our penultimate Ascent 2019 event took us to a truly amazing city with a deep history in the financial industry. In Boston, we were met by a sellout crowd, hungry for insights to innovate, disrupt and win!

Ascent Boston was particularly memorable as it was our first event following our acquisition of Advizr – an intuitive financial planning and client experience solution. At the event, attendees learned how we’re leading the industry by offering a new, game-changing client experience solution without an additional fee. Advizr founder Hussain Zaidi walked attendees through a demo of Advizr’s powerful financial planning capabilities that make it easy to investors to plan their financial priorities.



Not only did attendees learn about the exciting new offerings from Orion, they also heard from Fidelity Clearing & Custody Solutions® (FCCS), our collaborators for Ascent Boston. FCCS shared strategies to help advisors streamline their business process and position their firm for growth. It was a wonderful opportunity to put our strong collaboration with FCCS on display.

Keynote speaker Rohit Bhargava was a big hit, too. Rohit is an innovation and marketing expert who has started three companies, written five bestselling books and delivered insights to dozens of large organizations. Rohit's presentation, "How to Be More Innovative (and Predict the Future)," helped advisors answer questions like "what does it take to be more innovative" and "what does it take to be the most creative person in the room?" He helped advisors grasp the concept of "non-obvious thinking" and reinforced the goal of Ascent 2019 to help advisors innovate on the fundamentals of running their business.



Boston also featured an exciting networking event at the legendary Fenway Park, as the Boston Red Sox hosted the Kansas City Royals. That's Orion President Randy Lambert showing off his Orion gear on the big screen at Fenway.



What's Next?

Ascent 2019 has been a great experience for all of us at Orion, and we hope attendees feel the same way. But we believe the best is still yet to come!

As of the time we're publishing this blog, spots for our final Ascent 2019 event in Denver are filling up fast. Be sure to claim your spot before it's too late, so you

don't miss out on the fun. We can't wait to see you on the road.

REGISTER

0855-OAS-8/16/2019