The Power of Financial Planning: A Trilogy

Every great trilogy is built around a common goal, and the journey it takes to achieve it.

Ours is no different. As we watched the world rapidly changing as a result of COVID-19 and its far-reaching implications, we realized that, now more than ever, advisors were shouldering the burden not only of transitioning their businesses to run remotely, but also of keeping their clients grounded and composed in the face of a volatile market—all on top of continuing their daily operations.

Financial planning stood out as the solution.

So that became our goal: to help advisors help their clients through the power of financial planning. We began by offering our Orion Planning platform free of charge to all advisors, not just those who use our technology. But we wanted to do more to educate and emphasize the incredible value of financial planning during these unprecedented times.

That's when our trilogy was born. Starring Brian Morgan, CFP and Product Director of Financial Planning at Orion, our three-part webcast series tells the story of the importance of financial planning, offers industry insights and best practice tips, provides actionable guidance for improving client relationships, and looks beyond the COVID-19 pandemic to provide a roadmap for the "world after."

Installment One

Put Planning First: Tips to Kickstart Your Planning During Volatile Times

In part one of our financial planning series, we explore the effects of COVID-19 on both investors and advisors, and highlight the benefits of financial planning in both volatile and normal markets.

Financial Planning:

- Introduces a process to gather baseline facts and get to know clients beyond their investments
- Allows clients to go all in with a full, comprehensive plan, or start with a single goal
- Helps answer questions with real figures using Monte Carlo and What-If scenarios

But if you're not currently offering financial planning, there can be a steep learning curve to get started, depending on your technology. And in times like these, speed to market is critical. Watch the full webcast to find out how getting started with Orion Planning can help you offer value to your clients *right now*.

Watch Put Planning First: Tips to Kickstart Your Planning During Volatile Times.

Installment Two

The Human Advantage in Uncertain Times: How Planning Helps Provide Advice No Robo Can Replicate

One major impact of COVID-19 has been the delineation of which businesses are considered "essential." And while advisors have always been under pressure to prove their value, it's critical now more than ever to help clients understand the importance of advice and guidance from a real person.

Luckily, financial planning can help. It may seem counterintuitive that technology can help strengthen something as human as a relationship, but in fact, the right tools can do just that. In part two of our series, we take a look at the ways financial planning tech actually gives us a human advantage:

- Using goals-based workflows to focus on what's important to your clients
- Showing clients the asset allocation you're recommending based on their goals
- Increasing trust and transparency by offering a client portal and mobile app

Let Orion's financial planning technology help you better serve your clients. Watch The Human Advantage in Uncertain Times: How Planning Helps Provide Advice No Robo Can Replicate.

Installment Three

Financial Planning Post-Pandemic: Steps You Can Take Today to Prepare Your Practice for "The World After"

We're calling these "unprecedented times" for a reason. We've never been here before, so there's no way to know, as the country begins to re-open, exactly how much will change. But we can be sure that things *will* be different—and we can do our best to make sure our businesses and our clients are prepared.

In part three, the conclusion of our series, we explore some actionable ways to prepare for what an advisory business might look like post-pandemic, including:

- Making virtual meetings part of your client experience initiatives
- Adding risk management to the planning process
- Scaling your planning offering to include all investor types

When the world opens, you want to be ready. Watch Financial Planning Post-Pandemic: Steps You Can Take Today to Prepare Your Practice for "The World After."

Interested in learning more about Orion Planning and our entire suite of advisor solutions? Get in touch with us today!

The CFP ® designation is a professional certification for financial planners conferred by the CFP Board. CFP® professionals have completed extensive training and experience requirements and are held to rigorous ethical standard, while understanding the complexities of the changing financial climate, and know how to make recommendations in their clients best interest. To learn more about the CFP®, visit https://www.cfp.net/home.

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