

# Turning Good Into Great: Orion's New Partnership is the Perfect Way to Enhance Your Service Offering



An ice cream sundae with a cherry on top. Godzilla battling King Kong. Bowie and Jagger, together at last. Sometimes things that are great on their own become extraordinary when you add a complementary partner.

You know Orion as the premier provider of innovative financial technology, investment, and support solutions. How do you complement technology to help advisors of all business models? You add access to cash management and lending alternatives for personal, business and nonprofit needs.

## **A Welcome Combination**

Orion recently partnered with Focus Client Services (FCS) to help advisors create a centralized, more cohesive financial journey for their clients. Advisors can compete with private banks and wirehouses from an industry first fully integrated solution.

This exciting open-architecture based integration enables advisors to leverage FCS:

- Lending & Cash Management Capabilities, including access to a range of FDIC-insured deposit programs at competitive rates for clients' portfolio cash and held-away cash balances, as well as securities-backed and insurance premium finance lines of credit, commercial and business loans, residential and commercial mortgages, and air and watercraft

financing.

- An Experienced Service Team, with more than 125 years of collective banking expertise, offering a high touch, interpersonal service model designed to engage, educate, and guide advisors and their clients through the entire lending and deposit life cycle, particularly in times of market volatility.
- Confidentiality and Protection of Client Relationships, through lending and deposit programs, reviewed and delivered by a network of vetted and tested partners that are bound by regulatory privacy and data security standards.

### **An Exceptional Enhancement**

The Orion/FCS partnership offers a robust end-to-end experience for both advisors and investors, all within the sleek and redesigned Orion experience. Advisors will be able to kick off new loan requests automatically, manage these loans within the Orion Client Portal, connect these loans to an investor's financial plan via Orion Planning, and monitor the loan and showcase its value as an asset or liability through Orion's custom and dynamic reporting capabilities.

### **Add To Your Advisor Value**

This partnership is great news for investors—and even more so for advisors. By leveraging FCS, advisors can expect:

- Increased Client Retention: Providing more comprehensive financial services for clients creates increased loyalty and greater stickiness for advisors, leading to higher retention rates.
- Ability to Compete on a Larger Scale: Advisors competing with big banks for business are now armed with a powerful equalizer in the ability to offer competitive banking and cash management services.
- Attract and Serve High-Net-Worth Clients: Known for their complex needs, high-net-worth clients value concierge services such as banking and cash management from their financial advisors.

### **The Final Piece: You**

Ready to start offering your clients unparalleled service and exclusive lending options, all from Orion's award-winning interface? Watch our special on-demand

webinar detailing the Orion/FCS partnership. It's as satisfying as adding chocolate to milk.

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