

# WealthManagement.com Honors Orion with 3 Industry Awards



Orion Advisor Tech shined last night at this year's WealthManagement.com Industry Awards Gala in New York City, landing top honors in three categories:

- Disruptors: Industry, ASTRO
- Technology Providers: Rebalancing, ASTRO
- Technology Providers: Chief Marketing Officer of the Year, Kelly Waltrich

In its fifth year, the WealthManagement.com Industry Awards had more than 650 nomination submissions from 262 companies. Orion's three wins and nominations in five total categories are recognition of our ongoing commitment to helping our advisors innovate, disrupt, and win.

"Fintech today is all about using technology to help enable firms' ability to grow," says Orion Advisor Solutions CEO Eric Clarke. "At Orion, we use our clients' growth to drive our innovation, and we're honored that so many of our solutions are not just being recognized for being tops in the industry but also help our clients in that endeavor."

## Tech Lands Two Awards & Four Nominations

Innovation isn't a buzzword at Orion—it's the force that drives the development of our next-gen technology. And last night, it helped us garner four category finalist nominations for this past year's efforts to continue delivering solutions that truly impact our advisors businesses. Here's how we stacked up in each of the categories:

**Disruptors: Industry** — Orion's SMA optimizer, ASTRO (Advisor Strategy and Tax Return Optimization), won this industry disruptor award. ASTRO empowers

advisors to offer custom tax-managed SMA strategies based on client-specific risk settings, target strategy criteria, and investment preferences. Historically speaking, institutional-level risk analysis and portfolio optimization technology has been accessible only to large asset managers and national brokerage firms. ASTRO levels the investment management playing field with our cost-effective technology.

**Technology Providers: Rebalancing** — This year, we gave advisors a one-stop shop for customizing and rebalancing portfolios by combining our tax-efficient rebalancing platform, Eclipse™ Trading, with our award-winning SMA optimizer, ASTRO. Newcomer ASTRO offers direct indexing technology capable of streamlining tax-efficient, personalized client portfolios. So when using both platforms, advisors can now manage all of their client portfolios with more flexibility to differentiate their services with direct indexed portfolios.

**Technology Providers: Compliance** — Our cutting-edge Inform tool was a finalist in this compliance technology category. The internal, employee monitoring tool allows compliance officers to help satisfy Code of Ethics obligations by comparing employee trades with firm-wide trade activity, tracking gifts and outside business activities, and automating otherwise costly (and often inaccessible) front-running review—when leveraging the data already maintained in Orion Connect. Inform is offered as an add-on to Orion’s robust compliance suite, or as a standalone solution to non-Orion clients.

**Technology Providers: Cybersecurity** — With data breaches such a big concern in the industry, Orion has continued to be proactive in providing industry-leading and award-nominated cybersecurity tools. In addition to our ISO 27001 global information security certification and SSAE 18 audit standards, Orion’s all-in-one solution allows firms to retain control and oversight of their sensitive client and employee information while dramatically decreasing the amount of data at risk. We also are making cybersecurity easier for advisors through our soon-to-be-launched data monitoring and recovery integration with Experian, a global leader in consumer and business credit reporting, that will offer protection services directly through our Orion Client Portal.

## **Waltrich named CMO of the Year**

The Orion Culture revolves around the idea that great tech starts with great

people. Case in point: Kelly Waltrich, who was honored with the Technology Providers: Chief Marketing Officer of the Year award. Over the past year, Waltrich has put in a Herculean effort to build her team from scratch while supporting three brands, lead company-wide rebranding efforts, launch four new websites, and develop and execute an enhanced lead generation strategy.

Under her leadership, Orion attended 73 tradeshows and events, published more than 200 pieces of original content, landed 351 total mentions in the media, and increased MQLs 61 percent in 2018.

“It is an honor to be recognized for this award,” Waltrich says. “I can honestly say what we’ve achieved this past year would not have been possible without the talent and support from my team and our colleagues throughout Orion. I love the work I do, and I’ve found a team that I love to do it with!”

Orion’s comprehensive, innovative, award-winning technology can help you simplify your operations and workflows. Download this whitepaper to learn more about streamlining your workplace’s unnecessary complexities and empower your firm to show.

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