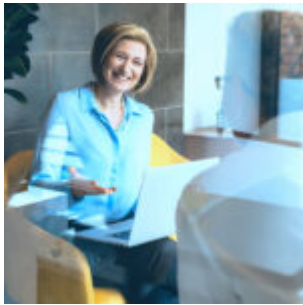


What Risk Intelligence Means for You



In 2021, Orion acquired HiddenLevers, a next-generation risk analytics and stress-testing platform. In August, we officially welcomed HiddenLevers into the Orion fold and reintroduced the solution as Orion Risk Intelligence.

In honor of Orion Risk Intelligence's arrival in the Orion Tech stack, we wanted to take a moment to share what Risk Intelligence means for you—how it can help you grow your business and build lifelong advisor-client relationships.

Simplify Your Sales Cycle

Across all industries, sales is a notoriously tricky part of building a business. Sales statistics consistently show that the process is time-intensive and involves incredible persistence.

That's why simplifying the sales cycle is so important. When you can reduce steps and efficiently build trust and demonstrate expertise, you can make it to the finish line faster. And with a shorter sales cycle comes increased growth and revenue for your firm.

So how does Orion Risk Intelligence help here?

3D Risk Tolerance Questionnaire

It starts with the 3D Risk Tolerance Questionnaire (3D RTQ). Designed with behavioral finance principles in mind, this RTQ is designed to quickly assess the

many sides of a prospect's financial reality, thinking and goals.

customer survey, 61% of respondents indicated that a positive sales experience requires the sales representative to provide relevant information. How can you do that without proposing a plan that considers a prospect's entire financial picture?

While some risk platforms are rigid in the asset classes you can include in your proposal, Orion Risk Intelligence offers a wide range of pre-built asset types, plus a custom asset builder for nonmarketable securities or alternative assets.

Incorporating all of your prospect's financial information in the proposal process allows you to craft a holistic financial strategy that more closely aligns with the prospect's current reality and future goals.

Flexible Risk Analytics

Once you have built your model, Orion Risk Intelligence's risk analytics tools make it easy to see how the strategy aligns with your prospect's risk tolerance and investing goals. You can also identify any over-exposure or potential downside risks.

Taking this step before presenting your proposed plan to your prospect empowers you to have answers prepared for any potential objections or concerns they may voice in your meeting.

Personalized Proposal Generator

The personalized proposal generator is one of Orion Risk Intelligence's significant improvements to the sales cycle.

Advisors can create detailed proposals in minutes, complete with their firm's branding. These proposals visually slice and dice data for prospects—with easy-to-read charts and graphs.

The clear graphic representation of elements like portfolio allocation, risk statistics, hypothetical performance and drawdown analysis, and geographical and sector-specific risk analyses provide prospects with a clear and concise look

at your precise plans for their finances.

Scenario Stress-Testing

Orion Risk Intelligence also features a library of more than 100 stress-testing scenarios. Unlike other risk analytics tools, which are backward-looking, Orion Risk Intelligence relies on current data to build scenarios based on real-world events.

Our team is constantly updating these scenarios to reflect the latest information. We were among the first to have scenarios based on the War in Ukraine, the COVID-19 pandemic and the unique inflationary environment of 2022.

Visualizing these events' impacts on prospects' portfolios can help them understand in concrete terms what investing with you will look like. It helps you clearly articulate the why behind your strategy and gives clients greater confidence in your rationale and approach.

In short, it provides the kind of experience that takes prospects from "maybe" to "yes."

Strengthen Your Existing Client Relationships

The Orion Risk Intelligence features that play a crucial role in the sales process remain vital in nurturing current client relationships.

An individual's financial goals will change many times throughout their life. A flexible risk intelligence tool allows you to test any proposed strategy adjustments to ensure they align with an existing client's new objectives.

Orion Risk Intelligence also provides in-depth investing information on an ongoing basis. If a client calls to check in with a question or concern, you can efficiently run a test on a particular asset or proposed shift in strategy and present detailed potential upside and downside risks in minutes.

Personalized, hands-on attention grows trust and strengthens relationships. As clients grow wealth, they'll turn to you for help managing this new money.

Manage Your Client's Expectations During Macro Tumult

A great investment advisor is more than just a financial expert—they're an unofficial therapist. When macro events rock the financial markets, it's up to you to quell clients' fears quickly.

Orion Risk Intelligence's stress-testing scenarios help you coach clients through those trying times. When you run a client's portfolio through a scenario, you can soothe their worries with a clear picture of potential outcomes.

Having charts and data on-hand to back up your calming words can make the difference between a client panic-selling and that same client investing in new assets that still show promise.

Orion Risk Intelligence is a game-changing tool for advisors. The ability to bring a deeper understanding of financial markets and a sense of certainty to discussions can transform all stages of the client relationship.

If you're ready to see what Orion Risk Intelligence can do for you, reach out to schedule your demo today.

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