What to Expect: Orion's August 2019 Software Update Highlights



On August 24th, the Orion portfolio accounting platform will receive its third software update of the year.

Buckle up, because there's a ton to share. But first—we'll give you a sneak peek into what you can expect in the upcoming weeks, like…

- The highly-anticipated launch of Event-Based Notifications, which will empower you to send automated text and email notifications for client milestones, account updates, and critical alerts
- Phase one of our next-generation client experience, powered by our recent acquisition of Advizr
- The fusion of direct indexing functionality within ASTRO, our SMA optimizer, with our tax-efficient rebalancing platform, Eclipse™ trading
- More improvements to RB3, like new data tags, chart types, and custom calculations
- Fresh-off-the press integration enhancements with your favorite tech providers like Redtail, Riskalyze, Salesforce, Fidelity Clearing & Custody Solutions®, and eMoney
- A fully revamped Tactical Tool, Eclipse™ trading's most comprehensive pre-trade review tool
- New income-related tiles in our client meetings dashboard, Insight

Elevate Your Client Experience Game with Event-Based Notifications

What We Built

Client experience is king. If you aren't providing above-and-beyond service to your clients, they'll find someone else who will. The good news: your clients aren't

going anywhere—at least not when you start using Event-Based Notifications.

Event-Based Notifications automate the creation and delivery of text and email communications for client milestones, like birthdays, as well as account updates like rebalances, model changes, and distributions. Once an event is selected, you can choose from client-specific data points (@ tags) in Orion Connect to automatically personalize the communication.



Creating an Event-Based Notification is a simple, five-step process:

1. Determine the distribution channel and event trigger
2. Select the appropriate recipient list
3. Write a subject line and message
4. Include client-specific @ tags and a relevant report with PII automatically excluded
5. Visit the review queue to approve, edit, or delete the notification when the event occurs

Why It Matters

Event-Based Notifications empower you to automate communications that historically have been managed on an ad-hoc basis (e.g. happy birthday emails, portfolio rebalance updates, etc.), reducing the time spent drafting and sending individual client communications.

Additionally, Event-Based Notifications promote transparency between advisor

and client and simplify the execution of a proactive and consistent client communication strategy. By keeping clients updated on the events that matter most to them, you can demonstrate your value as a true partner and fiduciary.

How to Learn More

To learn more about Event-Based Notifications, register for our upcoming webinar on September 12th.

Deliver the Advice-Driven Experience Your Clients Expect

What We Built

Our vision to fully integrate Advizr's next-generation client portal technology into Orion Connect starts with a single sign-on (SSO) integration, asset class mappings, and account type mappings (based on Orion's defaults) from Orion to Advizr. The SSO integration works at the advisor and rep level, allowing these stakeholders to engage with financial advice faster in order to provide more meaningful results.

For asset class mappings (based on Morningstar data), tickers and market values for investable assets in Orion automatically sync to Advizr and map to the JP Morgan Capital Market Assumptions, driving the probability of success for a plan. The financial plans factor the actual holdings in a model—not the proposed holdings—as Monte Carlo simulations are performed and recommendations are made.

Why It Matters

Financial advice is the foundation for client success, but getting started is often the largest barrier to entry. We're simplifying this process for you with behind-the-scenes asset mappings that take on the heavy lifting, so you can focus on executing your clients' plans.

How to Learn More

To connect clients' goals with your proposed investment strategies—while offering a best-in-class experience, click here to get started. While there is no additional fee, we are getting advisors started in batches to ensure a best-in-class experience. Please also note that you must complete our Advizr Ascent training

modules before being fully onboarded.

An Easier Way to Direct Index: The Marriage of ASTRO and Eclipse™ trading

What We Built

We fused direct indexing functionality within ASTRO, our SMA optimizer, with our tax-intelligent trading platform, Eclipse™ trading, so you can create custom, direct indexed portfolios and execute the recommended trades all without ever having to leave Eclipse™ trading. This means that for ASTRO-enabled accounts*, you can unlock five pre-defined direct indexing models—each with a specified buy list, number of securities, tracking error, etc—for immediate use within Eclipse™ trading.

Once a model is chosen, you can implement various types of restrictions, like security, sector/industry, ESG, and capital gains. ESG screenings, in particular, empower advisors with the ability to align investment strategies with the values of the end investor (i.e. avoiding positions related to firearms, gambling, etc.), without compromising overall portfolio goals and growth potential. ASTRO will then do the legwork, recommending the securities from the model buy list that have the highest impact for the client. Trades are then sent to the orders grid, where you can choose to process or decline them.

What's more, each client's direct indexed portfolio is tracked and monitored for out-of-tolerance alerts and optimization opportunities. You'll be notified when a portfolio's tracking error or risk drifts beyond a pre-determined threshold, or when there's an opportunity to optimize a portfolio—reducing some of the burden associated with oversight.

Why It Matters

Historically, barriers to direct indexing have included poorly integrated optimization and rebalancing tools, expensive outsourcing costs, and inefficiencies throughout the process. Not anymore. Now, you can direct index in one platform, including integration with all of your Orion Connect data, for a fraction of the cost of outsourcing.

How to Learn More

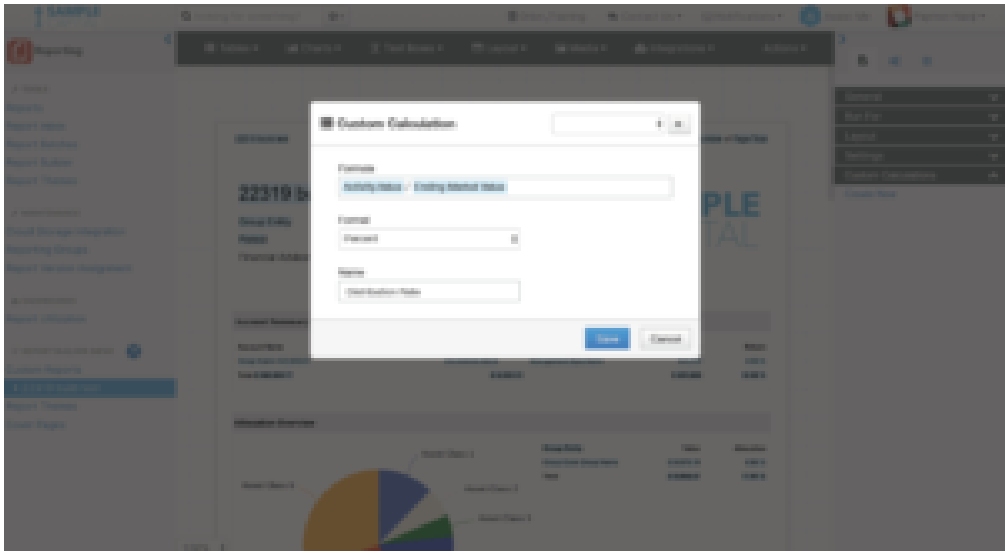
If you'd like to learn more about how to differentiate your services with custom direct indexed portfolios—created efficiently in one central platform—you won't want to miss our upcoming webinar on September 10th.

Take Your Client Reports to the Next Level with New Report Builder Upgrades

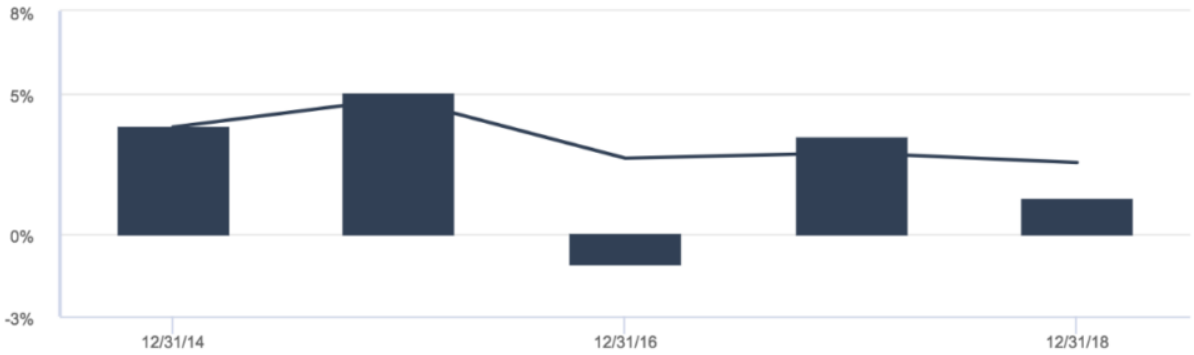
What We Built

Back in May, we released some big-time Report Builder enhancements, like the ability to group by time on tables and filter data on tables and charts. And now, we're back at it again—this time, with arguably more impactful new features.

- We've added @tags for Alternative Investment Platform (AIP) data, so you can create meaningful reports on alternative assets to better illustrate a client's holistic financial story.
- We've developed the functionality to create custom calculations across @tags for any value fields (percentage, number, or currency). Multiple data points are inserted into the tag to create the calculation. Once a calculation is created, you can name it and save it for future use. Ex: Distribution Percent = Activity: Distribution / Activity Ending Market



- We've added an "Include Interval Bars" option to Line Charts, allowing for a bar chart with a line chart overlay. For example, if you'd like to show portfolio period return compared to a portfolio cumulative return in one chart, you'll want to use this feature.



Why It Matters

Reporting is anything but table stakes. That's why we're constantly trying to give you an edge—from branding to efficiency to personalization to pure functionality. And we like to think that with these Report Builder updates, you will reap all of the above benefits—powering an unparalleled reporting experience for you and your clients.

How to Learn More

We've thrown a lot of new Report Builder updates your way recently. Should you have any questions on how to best maximize its functionality, we're always here to help at reporting@orionadvisor.com.

Build an Unbeatable Tech Environment with Our Newest Integrations

What We Built

Not all tech is good tech, but when it comes to our integration partners, we think otherwise. Our new integrations with Redtail, Fidelity Clearing & Custody Solutions®, eMoney, Riskalyze, and Salesforce are sure to provide unmatched efficiency for advisors looking to improve the depth of their tech stacks.

- Redtail: The two-way data sync between Orion and Redtail is now live! If you're a Redtail user and would like to avoid duplicative data entry, potential errors, and more time spent in a stuffy office, there's absolutely no reason you shouldn't be using this integration right now. Check out our recent blog post for more information.
- Fidelity Clearing & Custody Solutions®: The new Fidelity Digital Account Open Workflow enables you to open new Fidelity accounts in just

minutes—and 100% online. The integration works by automatically pushing data from Orion's New Account Center directly to the WealthscapeSM new account workflow. But we're not done yet. Coming to Beta in early September are Fidelity tiles for real-time balances, positions, and history at the account level in our Insight app—so you can share more custodial data with clients. Register for our upcoming webinar to learn more!

- eMoney: Clients can access the eMoney Client Portal through a single sign-on (SSO) directly from the Orion Client Portal—so they can easily view their financial plans in eMoney with just a couple of clicks.
- Riskalyze: Streamline proposal creation in Riskalyze by sending household data directly from the New Account Center in Orion to Riskalyze. Once the proposal is completed within Riskalyze, a PDF version of the proposal can be sent back to Orion. **Coming Soon!**
- Salesforce: The upcoming Salesforce sync is a flexible process that allows you to create custom fields in Salesforce, and map specified Orion data to them. Additionally, the sync will improve error transparency between the two systems and increase the speed of the sync—resulting in a more efficient experience. **Coming Soon!**

Why It Matters

Our open API architecture is designed for you—so you continue to have access to the most cutting-edge, time-saving, and flexible tools that make meaningful differences to internal processes and client outcomes. We're only getting started!

How to Learn More

To learn more about our next-gen integrations, please email integrations@orionadvisor.com.

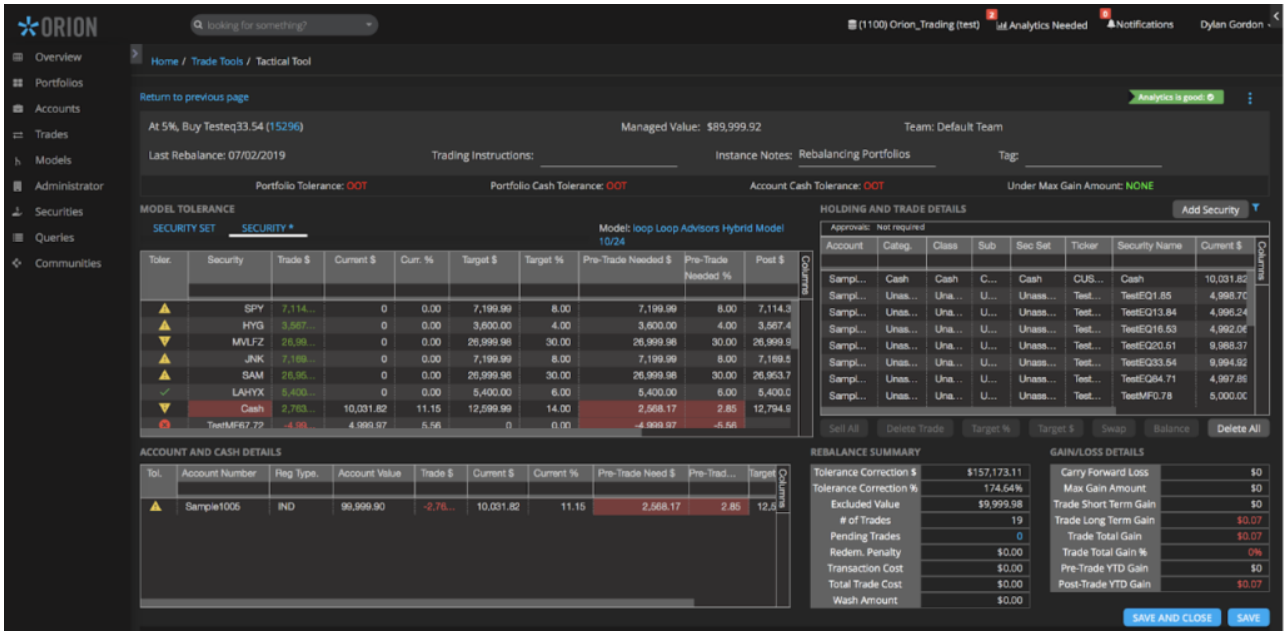
Conduct Pre-Trade Reviews & Make Real-Time Adjustments with Confidence

What We Built

Eclipse™ trading's Tactical Tool is well-known for empowering advisors with the robust tools they need to properly review trades before execution, as well as generate one-off trades as necessary. But we also realized that, in order to

maximize the tool's full potential and capabilities, we needed to improve the advisor experience

With our fully revamped Tactical Tool, the functionality remains largely identical to the former version, but we rebuilt the user interface and experience to increase the speed, create more streamlined workflows, and make the tool more intuitive—all so you can review trades and manually generate changes with greater efficiency.



Why It Matters

Sometimes, the results of our actions differ from our intent; trading is no different. The good news is that we can make more informed decisions prior to trade execution. Eclipse™ trading's Tactical Tool has been intentionally redesigned to ensure confidence and accuracy during the trading process. If you review trades before execution or occasionally make one-off trades, the Tactical Tool will be an indispensable assistant in confirming trades and changes match your objective.

How to Learn More

For advisors that use features available only in the old Tactical Tool, you'll see both tools in your Eclipse™ trading instance. And for advisors that don't use these features, we are currently shutting off the old Tactical Tool to avoid any confusion. To learn more, check out our recent blog post.

Show Clients the Money with New Tiles in Insight

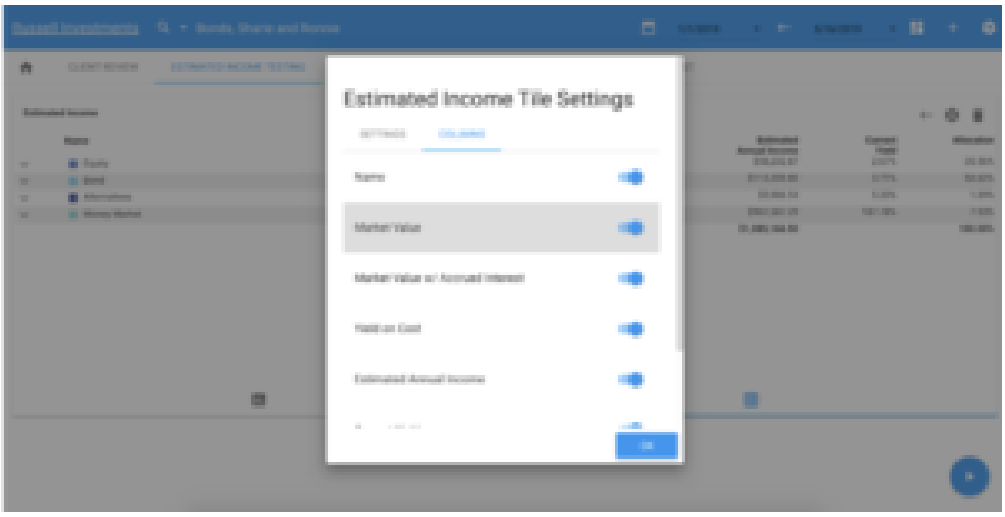
What We Built

Holdings, performance, and risk: these are critical elements to any financial story. But one crucial storyline that often goes overlooked is income. We're here to change that with two new income-related tiles in our client presentation dashboard, Insight.

- Advisors can show the fixed income for instruments like bonds and CDs with a pop-out that displays maturity distribution, coupon distribution, and yield. Advisors can control grouping by Asset Category, Asset Class, and Risk Category.



- We've also added an Estimated Income tile to illustrate the interest and dividends expected to be earned on investments in the next 12 months. Advisors can show yield on cost, current yield, and estimated annual income with the same aforementioned groupings.



Why It Matters

Income producing investments can be attractive options for investors because they reduce the overall risk of a portfolio. Now, advisors can share income alongside non-income producing investments to deliver a more comprehensive financial story.

How to Learn More

To learn more about the Insight app, reporting@orionadvisor.com is your go-to email.

Click here to sign up for our next product release webinar on August 28 to learn more about everything that's coming your way.

*The Direct Indexing functionality inside Eclipse™ trading requires a $1000 minimum balance in ASTRO—and access to Eclipse™ trading.

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