

What You've Missed at Ascent 2019 So Far



So far, Ascent 2019 On the Road has taken the Orion team of Subject Matter Experts to Atlanta, Georgia, Scottsdale, Arizona, and Chicago, Illinois. All three events were filled with eye-opening tech training, invaluable networking opportunities, and one-on-one consultations!

While Ascent 2019 is just getting started, we wanted to take some time to say “thank you” to all of our clients and prospects who helped make these first events a big success. Here are some of the highlights of our events to date:

Atlanta



Ascent 2019 started off with a bang at our inaugural event in Atlanta where we partnered with Redtail. 100+ clients and prospect joined us as we looked back at how our longstanding relationship with Redtail has helped advisors streamline their practices and allowed them to focus on client experience.



Attendees were inspired by the keynote session given by Terry Jones, founder of Travelocity.com, chairman of Kayak.com, and Chief Information Officer at American Airlines/Sabre. Jones reflected on his extensive experience to show advisors how to build a culture of innovation and how to do more with less.

The first day of Ascent ended with an unforgettable tour of Atlanta's state-of-the-art Mercedes Benz Stadium. Attendees enjoyed a photo op during an on-field experience at the home of the Atlanta Falcons. The visit wrapped up with a private dinner at Molly B's chophouse inside the stadium.



Day two was filled with insight into getting the most out of the cutting-edge technology from both Orion and Redtail. Advisors learned how to take full advantage of our Eclipse™ trading tool, Report Builder 3.0, Quarter End Dashboard, and much more!



All told, this event featured over 35 training sessions and more than 80 one-on-one consultation and training meetings. Advisors who took part in the one-on-ones in Atlanta have shared some great feedback with us!

"It was fantastic, this is such an advantage to have on hand."

"The 1:1 breakout was EXTREMELY useful. I was able to cover quite a few questions and get the answers I needed."

"As Orion prospects, it was incredibly helpful to have the chance to talk to other advisors already using Orion. Seeing the capabilities of the system in the presentations also helped."



Scottsdale

Perhaps the best part of the second stop of Ascent 2019 in Scottsdale, Arizona, was the beautiful weather - temps in the mid-80s! Or maybe it was the stunning view from the Omni Resort & Spa, backing up to the scenic Camelback Mountain. But if you ask us, nothing could beat the in-depth information we shared with advisors alongside our event partner, MarketCounsel - the industry's leading business and regulatory compliance consultancy.



At this Ascent stop, we gave advisors the insight they need on compliance trends and guiding their firms' regulatory obligations. Our Subject Matter Experts were on hand throughout the day for one-on-one consultation sessions to help advisors tackle any questions they might have. Once again, many advisors saw this as one of the most valuable parts of Ascent!

"SMEs were fantastic! I had in-depth sessions on trading, TLH, model building, reporting, compliance, inform, integrations.....great stuff!"

"These sessions were the main benefit of attending!"

"Orion Staff is amazing - Love the knowledge base they have and they seem to really enjoy their work."



At its core, Ascent is designed to give advisors the tools they need to be industry disruptors. The Scottsdale Ascent keynote session on day two truly delivered on this goal! Entrepreneur, author, consultant, and CEO Kaihan Krippendorff spoke on the importance of being the Disruptor, not the Disrupted. He talked about the value of embracing changes and discussed what makes some companies thrive as others fall behind.



When the second day of learning wrapped up, golfers and non-golfers alike enjoyed an evening of entertainment at Topgolf! If you've never been, Topgolf is a high-tech driving range where you score points by hitting your ball at targets. Everyone had a great time at this innovative approach to the driving range concept!



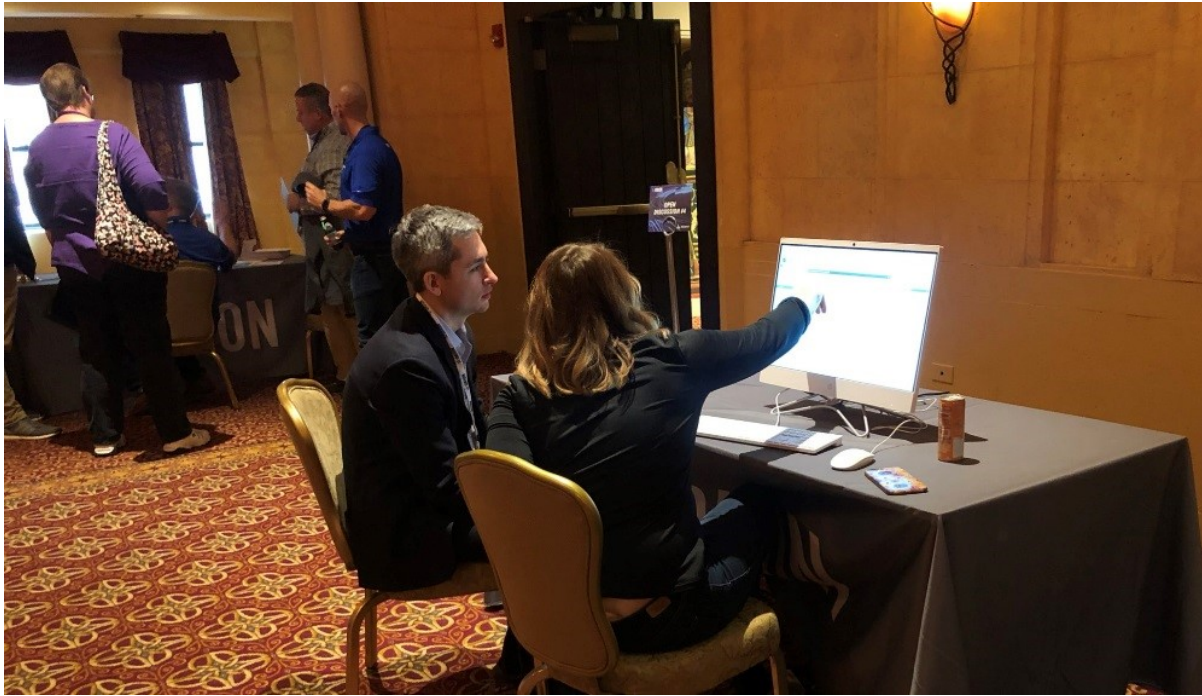
Chicago

Our third Ascent 2019 event took place earlier this month in Chicago where we partnered with Carson Group to deliver a jam-packed agenda that drew a sellout crowd!

One of the highlights from the Windy City had to be keynote speaker Howard Tullman, Executive Director of the Ed Kaplan Family Institute of Technology and Tech Entrepreneurship. Tullman echoed one of the central themes of Ascent – innovation. He explained that innovation is not changing your business entirely but rather an ongoing process to implement step-by-step improvements.



Tullman's address also discussed adapting to a world with a growing prevalence of artificial intelligence technology in which robots are taking over everything from radiology to pizza delivery. He explained that advisors need to find innovative ways to improve human connections, not replace them.



Chicago Ascent continued with one-on-one consultations and eye-opening sessions to arm advisors with new information, new ideas, and a renewed passion to be industry innovators. We capped off the evening with a happy hour networking opportunity, where advisors could talk shop with folks from Orion and Carson Group as well as their peers in money management.

What We're Looking Forward To

If you missed out on these first events of Ascent 2019, don't worry! Ascent on the Road continues throughout the summer and into the fall!

San Francisco - June 10-11th with Schwab & Riskalyze

Santa Monica - July 10th with Dimensional Fund Advisors

Boston - August 7-8th with Fidelity

Denver - September 4-6th

Each of these upcoming events will be filled with lessons and connections that will give you the tools and knowledge your firm needs to innovate, disrupt, and win! Click below to learn more, and to claim your spot at one of the next Ascent events.

SIGN UP FOR ASCENT 2019

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