August 2018 Software Update Highlights

On August 25th, we're bringing you another round of big enhancements as part of our next Software Update to the Orion platform. In this preview of what's to come, you'll get a sneak peek of:

- An all-new "light" version of ASTRO
- A daily refresh of data in the Trends app
- The ability to secure and protect your data from accidental edits
- A way to create a more accurate reflection of your asset managers value
- The option to create folders to organize your apps within Orion Connect
- A new integration with Asset-Map and more!

Look for another Orion blog in the weeks ahead, publishing the full Release Notes not covered in this post!

ASTRO

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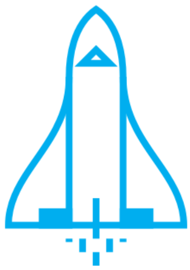


ASTRO Light for Client-Friendly Presentations

What We Built

“ASTRO Light,” a streamlined version of ASTRO (Advisor Strategy & Tax Return Optimization), allows you to easily review portfolio optimizations during prospect and client meetings.

ASTRO Light still includes full functionality to run a complete portfolio optimization, just like you would with ASTRO Advanced, but this interface gives you the ability to collect data and walk through an optimization process in real-time. ASTRO Light also allows for the inclusion of a Cap Gains tax schedule.

Portfolio Characteristics	Initial Portfolio	Optimized Portfolio	Target Strategy
Number of Holdings	42	75	75
Tracking Error	4.45	1.14	4
R-Squared	0.85	0.99	-
Beta	1.03	0.99	0.99
Projected Risk (SD)	11.58	10.34	10.39
Turnover	-	109.67%	-
Net proposed gain	-	$0.00	-
Proposed tax cost	-	$0.00	-

Why It Matters

ASTRO Light’s updated visual view style allows you to discuss portfolio optimizations with clients in a way that’s easy for them to understand. Now, you can better explain your value by showing clients exactly how you account for their ESG concerns and legacy assets, and create tax efficiencies in their portfolios.

How to Learn More

Reach out to Orion’s ASTRO team at astro@orionadvisor.com or click here to learn more.

Billing

Expanded Capabilities for Billing Financial Planning Clients

What We Built

When using this financial planning feature, you'll now be able to assign Financial Planning Fees to both existing households and clients with whom you have a financial planning only relationship.

Additionally, your advisors can set up these new households and fee agreements, and new clients can enter their billing information through the Client Portal, allowing fees to be processed straight through BluePay.*

Why It Matters

Previously, you could only bill households with assets in Orion Connect. With the household value restriction removed, you're free to bill however you want.

How to Learn More

Log into the Billing Generator app in Orion Connect to set up Financial Planning Fees. You can also take advantage of our [Ascent training course](#).

**Integration required*

Manage Billing Privileges for Enhanced Security

What We Built

You now have the ability to restrict a user's read and edit rights for:

- Recurring adjustments on a household

- Recurring adjustments on an account
- One-time adjustments on an account
- Payees on an account

Why It Matters

Security! You don't want the new college intern helping with your quarterly reports to accidentally make edits to a client's fee schedule. This update ensures you protect your firm and employees from accidental billing changes.

How to Learn More

In the Manage Users app, click on Roles > Edit Role > Records > Portfolio > Portfolio Billing and then select either General Account, Payees, or Recurring Adjustments.

Business Intelligence

Access Up-to-Date Business Intelligence In Trends

What We Built

Previously, Trends data refreshed each week, but now you can access data, updated daily, ensuring you get the most up-to-date business intelligence reports for your firm.

Why It Matters

With access to real-time data, your firm can make more agile, impactful business decisions.

How to Learn More

In the Trends app, select All Dashboards for the full view of all your firm's data.

Compliance

New Disclose Dashboard

What We Built

This new dashboard will capture all of your Form ADV and 13f regulatory reporting numbers and allow you to drill down on the underlying numbers and update important client and product data.

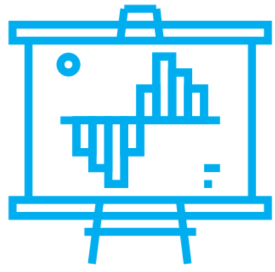
Why It Matters

Timely and accurate reporting is critical for the completion of your regulatory filing obligations. This new dashboard will save you time when analyzing and confirming your information, prior to filing.

How to Learn More

In the Compass App, click Disclose Dashboard.

Reporting



Adjust to Portfolio Changes Over Time With

Dynamic Benchmarks

What We Built

You can now assign dynamic benchmarks to a portfolio that adjusts to allocation changes over time. These benchmarks can be assigned to individual Asset Categories or Asset Classes within a database.

Why It Matters

Dynamic benchmarks allow you to not only account for dollar cost averaging when reporting on a portfolio's performance against a benchmark, but also creates a more accurate reflection of an asset manager's value. Let's look at two scenarios where this new functionality will be useful for your firm:

- If a client contributes $10,000 each month to their portfolio for an entire year, a static benchmark will create nearly unavoidable underperformance for the asset manager. However, with a dynamic benchmark, the amount of cash is automatically accounted for in the benchmark weighting and the drag is removed. As a result, any under- or over-performance against the benchmark is more accurately shown as the result of security performance.
- For large systematic withdrawals, using a dynamic benchmark removes market shifts or allocation effects, and instead shows the "selection effect," or the performance solely driven by the assets chosen by a manager.

How to Learn More

Open the Blended Benchmarks app, then select Actions > New Benchmark > Select the Dynamic Type > Assign benchmarks for the various Asset Classes or Categories > Save your new blend > Assign this benchmark in the Benchmark Assignment app.

Progress Towards An Enhanced Report Builder

What We Built

We're continuing to enhance our report generation, creation and theming capabilities with an expected Q4 launch.

Why It Matters

With even more flexibility for building and customizing the design of your own reports, you can quickly deliver higher quality data and insights to your clients.

How to Learn More

Keep an eye out for additional updates around report builder coming later this year!

User Interface

Organize Your Orion Connect Apps

What We Built

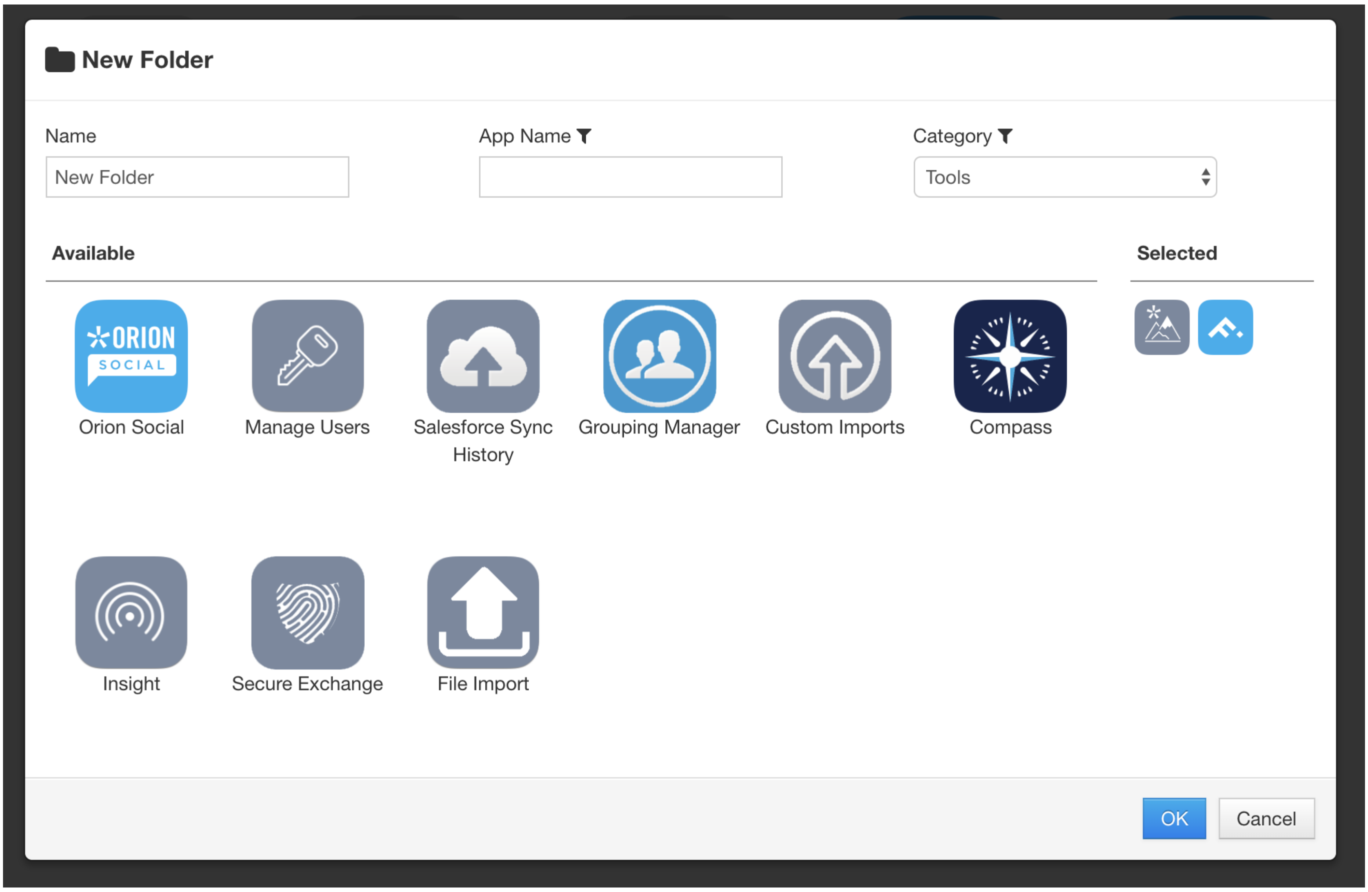
Orion users can now organize and bundle their apps into folders within Orion Connect.

Why It Matters

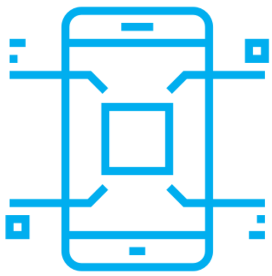
Customizing the way your apps appear within Orion Connect, allows you to quickly find and access the features you use most frequently.

How to Learn More

Log in to Orion Connect and select “New Folder” along the bottom of the screen. When this screen pops up, select the apps you want in a folder and give it a name!



Integrations



Create Engaging Client Meetings with Asset-Map

What We Built

For advisors leveraging Asset Map’s technology, our latest integration allows you to pull your Household and Account level data within Orion into their platform.

Why It Matters

Connecting Asset-Map directly to Orion household data provides a deeper view into details of a portfolio, like performance, documents, statements, allocation and more. These enhanced insights can help you create more interactive and productive conversations with clients.

How to Learn More

Log into Orion Connect and click on the Integrations Center app to access the tile.

Native Monte Carlo Capabilities Through FinMason

What We Built

Orion users can now access the power of FinMason's institutional-grade, investment analytics platform to deliver dynamic financial plans quickly and at scale.

Why It Matters

Having access to an affordable and agile tool that is not dependent on exhaustive levels of data from clients and prospects, enables you to deliver simple yet dynamic financial projections based on current saving and spending patterns.

How to Learn More
For more information on this integration, sign up for a webinar here.

All of the highlights you've read about in today's article, plus many more enhancements and upgrades, will be coming to you when the Orion software update rolls out on August 25th.

To learn more about how to scale your firm with these new enhancements, sign up for our software update webinar on **September 13, 2018.**

REGISTER NOW

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