ORION ADVISOR TECH

Next Generation Client Experience

Seamlessly connect progress toward your investor's goals with your proposed investment strategies.

It's no secret that consumers expectations are shifting. They not only want what they want, when they want it– but they also want to connect and collaborate even more with their service providers.

This leaves financial advisors with a tall order: spending more time interfacing with their clients, creating digital experiences that "wow," and finding new ways to continuously prove their value.

Orion + Orion Planning

With an easy five-step process, advisors and their clients can set a foundation for financial success that empowers better investment outcomes, all on a single platform.

Data Gathering

Automated, streamlined and standardized process for full data discovery that can be completed on a self-directed, advisor-driven, or joint live basis.

Goal Setting

Intuitive, goal-driven workflows are supported by a client-led risk assessment that helps advisors assign the appropriate model to a client's account.

Monte Carlo Simulation

Interactively change inputs and see how those changes affect financial goals over time.

Next Steps

Access insights needed to take action right within the application, putting your client's plan into motion.

Client Portal

Collaborate with clients from start to finish, including goals discovery, planning, progress tracking, and interactive meetings.

Empowering Advisors and End-Investors Alike with Integrated Engagement Tools:

Timely Notifications

Advisors receive notifications in Orion Connect when clients register a plan or upload documents.

Seamless Connectivity

Single sign-on from Orion to Orion Planning works at both the advisor and client levels for a streamlined, efficient experience.

Comprehensive Investment Details

Advisors can view their clients' financial plans alongside the investment performance of their accounts —including Positions, Transactions, and Performance—in one environment.

Pre-Built Sub-Reports & Presentation Tiles

Critical reports and tiles, such as Retirement, Probability of Success, and Net Worth Detail, allow advisors to show clients the success of their plans.

Identity & Financial Protection

Advisors can offer online identity and financial account monitoring services, in addition to credit score monitoring through Experian—directly within the Orion Planning Client Portal.

Integrated Document Vault

Orion Statements, Custodial Statements, and Custodial Tax Documents automatically flow from the Orion Client Portal to the Orion Planning Client Portal.

Advisors Embracing the Client Experience Revolution Will be the Ones That Win:

1 in 3

Clients say they will walk away from a brand they love after one bad experience[1]

5X

Faster growth rate of firms that focus on CX vs. those that don't[2]

16%

Price premium, plus increased loyalty from firms that offer great CX[3]

1. PWC

2. Pershing

3. PWC

Ready to take your client experience to the next level?

LET'S TALK

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