

ACCESS

It's none of our business,
but if you want to review a report
**at an Eagles concert,
you can.**

Having the tools to view your accounting data from your office, home, or while traveling is a must. We provide you access to your accounting and reporting, as well as operational access to our core systems to efficiently run your business, **no matter your location.**



17605 Wright Street
OMAHA, NE 68130

ORION EMPOWERS YOU WITH:

- Cloud-based platform to access performance reporting, analytics, trading, and metrics
- Web portals & mobile apps branding your firm
- Portfolio accounting delivered through your CRM via Orion Connect
- Advisor configured dashboards
- Real time access to edit your data
- Data maintained in a secure environment

Orion can help you enjoy your business again. To learn more, contact Robin at robin.danahy@orionadvisor.com or 402-896-7329.

BILLING

Our accuracy might afford you
the ability to hire a
**donut catering service
at your office.**
Think about it.

Next to managing client portfolios, advisory fee billing is one of the most important aspects of running an efficient practice. We provide an end-to-end billing process to help you calculate, collect, and post your advisory fees.





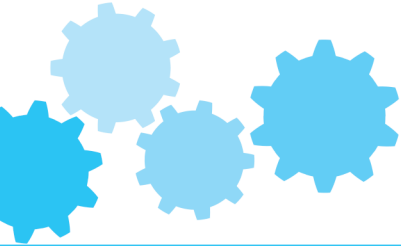
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ORION EMPOWERS YOU WITH:

- Calculated renewals & interim bills
- Invoices via e-delivery or print with performance evaluation
- Technology to collect, track, and pay out fees
- Notification to clients and advisors
- Ability to post payments and track outstanding receivables

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IMPLEMENTATION



**We won't leave
you hangin'.**

We have been working with advisors for nearly 10 years, migrating historical data and core processes unique to your business. Our data conversion team, training staff and tracking systems will support your firm through the entire implementation process.



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ORION EMPOWERS YOU WITH:

- Dedicated staff accessible via telephone and email
- Clearly communicated timelines and deadlines
- Weekly conference calls during implementation; monthly call will be held post-implementation
- Audit files sent to verify client, registration, account, and product information
- Fee list schedule (if applicable)
- Payables report by representative (if applicable)
- Training for daily processes and utilization of Orion's applications
- Quarter-end statements

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INTEGRATIONS

The rumors are true.

**We've been
hooking up
a lot lately.**

We're focused on integrating our technologies with industry CRM, financial planning, and trade order management systems to create efficiency between the technologies you implement. If additional integrations are requested, we will provide our technology partners a fully documented web service API to integrate real time data.



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ORION EMPOWERS YOU WITH:

- Price Feed
- Index Feed
- CRM
- Trade
- Plan
- Analytics

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PERFORMANCE & COMPOSITES

The only time in your life
**you won't need
your tap shoes**
for great performance results.

Performance is value that serves as a critical component in your relationship with your clients. We'll help you present your performance by supplying fully audited data available in a variety of formats (TWR, IRR, Simple). Once the numbers are in, we'll empower you to capitalize by building rich composites that will speak to your historical management.



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ORION EMPOWERS YOU WITH:

- Audited performance calculations
- Ability to support TWR, IRR, and simple rate of return
- Analyze portfolios by household, asset class, & risk category
- Integrate research reports from AdvisoryWorld
- Business metric reports to make informed business decisions

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RECONCILED DATA

Welcome to the
nerdiest thing
to get excited about.

Data is the foundation of your business. If we don't begin with accurate and timely data, it's possible that reporting, billing and trading become afterthoughts. We're here every Saturday morning to perform full reconciliation of prices, positions, corporate actions and reorgs, to help ensure that your groundwork is solid.



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ORION EMPOWERS YOU WITH:

- SSAE 16 Type II audited reconciliation process
- Full reconciliation of prices, positions, corporate actions, and reorgs
- Data reconciled each day following market activity and on Saturdays
- Data maintained in a secure environment

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