

Orion Rundown: New Ways to Pay for Ascent, ASTRO Out of BETA, Tech Tips and More!



New Name, Same Great Updates

You may have noticed that we changed the name of this update from the “Orion Bi-Weekly” to the “Orion Rundown.” As we continue to enhance Orion to better meet your needs, we’ll provide you with a rundown of what you need to know, every other week!

ASTRO: Now Out of BETA

ASTRO, Orion’s highly anticipated Advisor Strategy and Tax Return Optimization Solution is now out of BETA. Join one of our next demos to find out how you can begin automatically maximizing returns, while mitigating risks in your clients’ portfolios.

Register Now

New Ways to Pay for Ascent Registration

We want you to connect, network and share best practices with other Orion users at Ascent 2018. This is why we’re offering additional ways to pay: online, by direct invoice or adding the cost to your next Orion quarterly invoice. Take

advantage of these payment methods by simply starting the registration process.

Register Now

Tech Tips from Orion's Experts

To help you get the most out of the Orion Connect platform, our subject matter experts have highlighted some best practices to help solve everyday issues and continue growing your business quickly and at scale.

Read Our Tips

Enjoy Our Enhanced Salesforce Integration

We know just how important it is for your advisor tech to connect with your CRM tool. This is why we've enhanced our Salesforce integration, allowing you to display Orion's Insight dashboards within Salesforce on a Household or Financial Account record.

Learn More

An Inside Look at Our Eclipse™ + Communities Summit

We hosted our most recent Eclipse™ + Communities Summit in Omaha this past week. Curious what insights our attendees gained when discussing our trading tools? We've pulled together some key session takeaways covering Eclipse™ basics, platform terminology, preference personalization, and more.

Read More

New Tech Coming Soon

We're enhancing our Report Builder solution to allow you more flexibility when it comes to building and customizing the design of your own reports, so you can quickly deliver higher quality reports for clients. Look for more details coming soon!

More Highlights

- Orion Poll: Are You Using iCapital?
- Calling all breakaway advisors! We want to hear your story.
- Join our upcoming Eclipse™ + Communities Summit in Seattle, July 31 & August 1
- Check out the latest Ascent training on ASTRO in your Course Catalog. Don't have Ascent access? [Click here.](#)
- See more upcoming Orion webinars and events
- Orion Partners with Lincoln Financial Group to offer a robust data platform for fee-only advisors.

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