

ORION PORTFOLIO SOLUTIONS

Becoming a Strategist on the Orion Platform

We empower financial advisors with customizable investment solutions that help investors pursue and achieve their long-term goals. Orion Investment Portal allows advisors and investors to gain access to models spanning brand, boutique, and emerging strategists for fixed income, equities, and alternatives, including Mutual Fund models, ETF models, and equity SMAs.

1,600 RIAS WITH ACCESS

239+ RIAS WITH ASSETS

\$46B+ AUM

As of 01/01/2026

Our Process

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Submission of Qualifying Information

We require the following to be available on the platform:

- Morningstar ID
- Minimum 1-year, track record with \$10M in assets per strategy
- GIPS® or Third Party Verified Performance
- State or SEC Registration
- Fixed Income SMA managers must have a CUSIP license

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Due Diligence Process

Our investments and Due Diligence Team will perform the following screens to see if the strategist is an appropriate fit.

Quantitative Screen

- Material Legal/Compliance findings
- Performance
 - Performance relative to peers – looking to screen out strategies with weak track records that will make it hard to gain traction on the platform
 - Risk relative to peers
- Overall strategy and firm assets – Firm assets must be greater than \$100mm and would like to see strategy assets of at least \$10mm
- One and three year strategy flows – seek to avoid strategies/firms that are seeing significant outflows that could result in business risk
- Number of total firm employees and investment professionals
 - Due Diligence Questionnaire - If Quantitative Screen passes, we provide the Strategist with a due diligence questionnaire for them to complete and return with attachments.

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Execution of Strategist Agreement

If approved, Orion will circulate the agreement and disclose the fees paid by the strategist.

Onboarding Fees

INITIAL MODEL SET-UP FEES

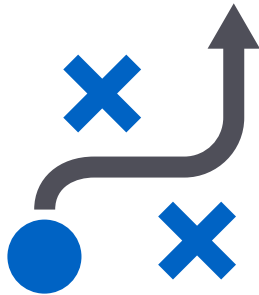
Model Count	Fee	Cumulative Fee
1st Model	\$5,000	\$5,000
2nd Model	\$4,000	\$9,000
3rd Model	\$3,000	\$12,000
4th Model	\$2,000	\$14,000
5th Model	\$1,000	\$15,000
Additional Models	\$1,000	\$16,000+

Ongoing Fees

- Model Maintenance Fee \$500/model/quarter

Admin Fees

- Added by Orion 2bps for MF/ETF
- 5bps for Stock and Bond SMA Models



Get started by providing some initial information.

Get Started

Ready to learn more? Contact us today for more information.

CALL
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