



# Orion Strategic Partnerships and Event Sponsorships

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**Powering Advisors.  
Winning for Investors.**

2026

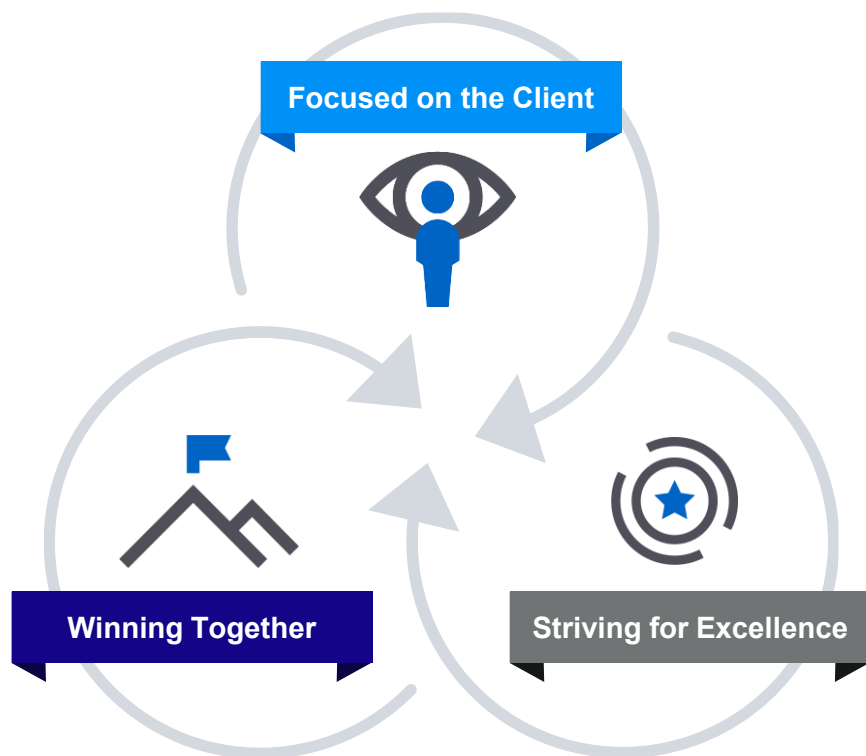
Sponsorship Opportunities: [sponsorships@orion.com](mailto:sponsorships@orion.com)

# | About Orion

## Our Mission

**We are building a wealth-tech community where every advisor and investor thrives.**

## Our Culture



## Strategic Pillars

**Pioneering Technology**

**Reliable Systems and Support**

**Comprehensive Wealth Solutions**

**Flexible Ecosystem**

**Growth Resources**

## Our Values

**Create raving fans • Innovate Always  
See It Through • Support One Another**

# Orion's Scale

**#1** market share for CRM,  
Portfolio Accounting and  
Custom Indexing<sup>3</sup>



**\$102.7B**

Total  
Wealth Management  
Assets

**17 out of 20** Today, 17 out of the  
Top 20 Barron's RIA Firms  
rely on Orion's technology<sup>1</sup>

**2,400** Independent Advisory Firms



**114,000**

Redtail Users

**\$5.2T**

Platform Assets



**Powering  
advisors.**

**Winning for  
investors.**

# | Orion Strategic Partnerships

# Orion Strategic Partnerships

## Build Influence. Deepen Engagement. Drive Growth.

The Orion Strategic Partnerships Program is designed for organizations that want to go beyond a booth—forming meaningful, year-round relationships with Orion’s advisor community, executive leadership, and sales teams.

Built around our flagship events, digital content platforms, and community-based marketing initiatives, this multi-tiered partnership program offers high-impact opportunities to elevate your brand, engage directly with financial advisors, and influence the future of wealth-tech.

Whether you're a top-tier asset manager, technology partner, or service provider, our model gives you flexible access to the people, programs, and platforms that matter most. With enhanced visibility at Ascent, curated community group involvement, dedicated marketing and sales alignment, and executive-level connection points, Orion’s Strategic Partnerships Program is your gateway to deeper engagement and smarter growth.

### For 2026, Orion will offer Strategic Partnerships across three tiers:

- Premier Partner
- Platinum Partner
- Community Partner

These flexible levels ensure the right fit for your goals, budget, and brand ambition.



# NEW! Orion Community Groups

We're excited to introduce a powerful new opportunity for our partners to reach Orion's most engaged client audiences. Through exclusive sponsorship of Orion's Community Groups, partners gain year-round access to decision-makers and influencers shaping the future of advice.

Created in direct response to client feedback, Orion's Community Groups launched at Ascent 2025 and quickly became one of the most valued engagement channels for top clients. Designed to connect professionals in similar roles, these groups foster peer learning, real-time collaboration, and strategic idea exchange.

On the Orion Tech side, Community Groups bring together C-suite leaders from RIAs across the country who are building and optimizing tech-enabled advisory firms.

On the Orion Wealth Management side, the Elite Advisor Network connects top-tier advisors based on assets under management and platform engagement, offering a high-level forum for strategy, growth, and practice evolution.

## Why It Matters to Sponsors

Community Groups are a year-round opportunity to align your brand with Orion's most strategic and influential clients. These decision-makers meet 6–10 times virtually throughout the year and gather in person at Ascent, creating consistent, meaningful opportunities for connection and influence.

As a sponsor, you'll gain visibility with a highly curated audience, build trust in a more conversational setting, and position your firm as a valued contributor to the conversations shaping the future of advice.



## Now Open to Strategic Partners Only

Starting in 2026, access to Orion's Community Groups is available exclusively to participants in our Strategic Partnerships program. This ensures the most aligned, high-value connections between our clients and the firms we trust to support their growth.

## Orion Community Groups

- Chief Technology Officers (CTOs)
- Chief Compliance Officers (CCOs)
- Chief Operating Officers (COOs)
- Chief Investment Officers (CIOs)
- Elite Advisor Network
- BeFi Advisors
- Investments
- Trading

# 2026 Premier Partner

Annually (4 available)

**\$250,000**

## 2026 Orion Ascent Conference

### EXHIBIT

- 20x20 booth space
- Opportunity to purchase additional 10x10 units for additional fees
- First selection of exhibitor booth placement
- Kiosk in Tech Village (tech integration partners only)
- Four lead scanning licenses for booth

### ATTEND

- 10 conference registrations (includes speakers)
- Opportunity to purchase unlimited additional full-conference or day-pass registrations at published rate
- Invitation to attend sponsor receptions
- **NEW!** Invitation to pre-con Wealth Partner or Tech Partner “track” featuring exclusive content and insights
- Two passes to pre-con Elite Advisor event and access to all Elite Advisor spaces
- **NEW!** Ten 1:1 Meetings with advisors scheduled in advance and opportunity to schedule more\*\*

### SPEAK

- **Main Stage:** 15-minute main stage fireside chat
- **Breakout Session:** Opportunity to nominate a presenter for a 40-minute CE or Advisor-led session\*
- **Round Table**  
**NEW!** Moderate up to four round tables with the community groups of your choice.

### PROMOTE

- Choice of sponsorship on one of the following items (first-come, first-serve): Mobile App Home Screen, Conference WiFi, Registration Check-In Screen, Mobile App Gamification

## PROMOTE (CONTINUED)

- Premier logo placement in select conference print, electronic and on-site branding
- One targeted pre-con email sent to all conference attendees on your behalf
- One targeted pre-con email sent to up to four community groups on your behalf
- Mobile app banner advertisement
- One push notification to all attendees
- One appreciation social media post during conference
- “Blurb” in Orion client newsletter
- Pre-event and post-event conference opt-in attendee list, including email addresses
- Opportunity to provide promo item/gift in Elite Advisor Lounge

### EXTRAS

- **NEW!** 10% discount on any Events, Content, or Connect add-ons
- Complimentary concierge coordination of a dine-around (sponsor pays for meal)
- Optional on-site Ascent concierge

### Partner Support

- Dedicated Marketing Manager
- Monthly marketing planning meetings
- Quarterly marketing engagement reports
- Monthly status report of all ongoing effort/initiatives

### Orion Advisor Academy

- Featured provider of 1 CE course/quarter (available for 3 years)
- Opportunity to “own” a specific topic tied to your brand/strategy/expertise
- Weekly list of opt-in enrollees in courses
- Logo placement in select branding
- Resource Center listing

## 2026 Events

- Sponsorship of one exclusive event and two standard events. Choices include:

### Exclusive Events

- 2026 Wealth Management Elite
- 2026 CEO Summit
- 2026 Wealth Management Advisory Council In-Person Meetings

### Standard Events

- 2026 Wealth Management Territory Town Halls
- 2026 Align/Redtail University
- **NEW!** 2026 OCIO Bootcamp

### **NEW!** Community Groups

- Pre-Ascent introduction in virtual community group meeting
- Invitation to all community group sessions at Ascent
- Serve as the quarterly co-facilitator of your choice of one Orion community group

### **NEW!** Wealth Management Data Package

- OPS & Brinker proposals including the advisor name, email, phone, city, state, and zip. Other details shared are BD name, proposal amount, % allocation, and model name.
- **NEW!** OPS & Brinker enhanced AUM and flows reporting
- Access to the Monthly “What’s Hot” data with flow analysis including flows percentages and top 10 models ranked by 3mo, YTD, and 1 year. Data is categorized by benchmark, mandate, firm size, model type, and asset class.
- Reports available in your portal.

## Marketing Placements

- Two targeted emails
- One social media share/quarter
- Two dedicated webinars
- Quarterly featured content downloads housed in Orion’s Online Resource Center and promoted in client newsletter with link + leads list and quarterly engagement reports
- Monthly guest blog authored by sponsor and posted in Orion’s online resource center
- One featured guest opportunity in our ongoing value-add content (webinars, podcasts, videos, etc.)\*
- Dedicated partner page on orion.com
- **NEW!** Creation of two Sales Loft templates on partner to be distributed to Orion sales team

## Orion Team Access

- 30-minute 1:1 with Orion CEO
- 30-minute 1:1 with one additional Orion executive or board member
- **NEW!** 30-minute “pitch” opportunity with either the head of investments or head of tech product
- **NEW!** Opportunity to be part of a 30-minute Ascent pre-conference meeting with Orion sales team members
- **NEW!** Two targeted emails and slack posts to the Orion sales team sent on your behalf
- Opportunity to attend one in-person Wealth Management or Technology sales meetings
- Opportunity to present at two of either the virtual Wealth Management or Technology weekly sales meetings
- One strategy meeting with Orion exec team
- Advanced insight into Orion roadmap

\*Topic, speaker, title and description to be agreed on with Orion  
\*\* Priority access to scheduled 1:1 advisor meetings, with a minimum number of time slots reserved. While Orion facilitates scheduling, attendance is not guaranteed.



# 2026 Platinum Partner

Annually (6 available)

**\$175,000**

## 2026 Orion Ascent Conference

### EXHIBIT

- 10x20 booth space
- Opportunity to purchase additional 10x10 units for additional fees
- Second selection of exhibitor booth placement
- Kiosk in Tech Village (tech integration partners only)
- Two lead scanning licenses for booth

### ATTEND

- Four conference registrations (includes speakers)
- Opportunity to purchase unlimited additional full-conference or day-pass registrations at published rate
- Invitation to attend sponsor receptions
- **NEW!** Invitation to pre-con Wealth Partner or Tech Partner “track” featuring exclusive content and insights
- Access to all Elite Advisor spaces  
**NEW!** Five 1:1 Meetings with advisors scheduled in advance and opportunity to schedule more\*\*

### SPEAK

- **Breakout Session:**  
Opportunity to nominate a presenter for a 40-minute CE or Advisor-led session\*
- **Round Table**  
**NEW!** Moderate up to two round tables with the community groups of your choice.

### PROMOTE

- Premier logo placement in select conference print, electronic and on-site branding
- One targeted pre-con email sent to up to two community groups on your behalf
- Mobile app banner advertisement
- Pre-event and post-event conference opt-in attendee list, including email addresses

### EXTRAS

- **NEW!** 10% discount on any Events, Content, or Connect add-ons
- Complimentary concierge coordination of a dine-around (sponsor pays for meal)

### Wealth Management Data Package

- OPS & Brinker proposals including the advisor name, email, phone, city, state, and zip. Other details shared are BD name, proposal amount, % allocation, and model name.
- Access to the Monthly “What’s Hot” data with flow analysis including flows percentages and top 10 models ranked by 3mo, YTD, and 1 year. Data is categorized by benchmark, mandate, firm size, model type, and asset class.
- Reports available in your portal.

### 2026 Events

- Sponsorship of one exclusive event  
Choices include:  
**Exclusive Events**
  - 2026 Wealth Management Elite
  - 2026 CEO Summit
  - 2026 Wealth Management Advisory Council In-Person Meetings

### Orion Advisor Academy

- Featured provider of 2 CE courses (available for 3 years)
- Weekly list of opt-in enrollees in sponsored courses
- Logo placement in select branding
- Resource Center listing

### **NEW!** Community Groups

- Pre-Ascent introduction in virtual community group meeting
- Invitation to all community group sessions at Ascent
- Serve as the quarterly co-facilitator of your choice of one Orion community group

### Marketing Placements

- One targeted emails
- One dedicated webinars
- Two featured content downloads housed in Orion's Online Resource Center and promoted in client newsletter with link + leads list and quarterly engagement reports
- Quarterly guest blog authored by sponsor and posted in Orion's online resource center
- Dedicated partner page on orion.com
- **NEW!** Creation of one Sales Loft templates on partner to be distributed to Orion sales team

### Orion Team Access

- 30-minute 1:1 with one additional Orion executive or board member
- **NEW!** One targeted emails and slack posts to the Orion sales team sent on your behalf
- Opportunity to present at one of either the virtual Wealth Management or Technology weekly sales meetings

### Partner Support

- Dedicated Marketing Manager
- Quarterly marketing planning meetings
- Quarterly marketing engagement reports
- Monthly status report of all ongoing effort/initiatives

\*Topic, speaker, title and description to be agreed on with Orion  
\*\* Priority access to scheduled 1:1 advisor meetings, with a minimum number of time slots reserved. While Orion facilitates scheduling, attendance is not guaranteed.

# NEW! 2026 Community Partner

\$100,000

Annually (8 available)

## 2026 Orion Ascent Conference

### EXHIBIT

- Turnkey sponsored community group hangout connected to the Orion booth
- Two lead scanning licenses for booth
- Opportunity to schedule 1:1 meetings with advisors

### ATTEND

- Four conference registrations (includes speakers)
- Opportunity to purchase unlimited additional full-conference or day-pass registrations at published rate
- Invitation to attend sponsor receptions
- Invitation to pre-con Wealth Partner or Tech Partner “track” featuring exclusive content and insights

### SPEAK

- **Round Table**  
Moderate up to four round tables with the community groups of your choice.

### PROMOTE

- Premier logo placement in select conference print, electronic and on-site branding
- One targeted pre-con email sent to one community groups on your behalf
- Pre-event and post-event conference opt-in attendee list, including email addresses

### EXTRAS

- 10% discount on any Events, Content, or Connect add-ons
- Dine-around host for 10-30 attendees of one selected community group (sponsorship includes the meal and logistics planning)

### Partner Support

- Dedicated Marketing Manager
- Bi-annual marketing planning meetings
- Quarterly marketing engagement report

### Community Groups

- Pre-Ascent introduction in virtual community group meeting
- Invitation to all community group sessions at Ascent
- Serve as the annual co-facilitator of your choice of one Orion community group

# 2026 Strategic Partnerships Menu

	Premier Partner (4)	Platinum Partner (6)	Community Partner (8)
2026 Ascent	\$250,000	\$175,000	\$100,000
Booth	20x20	10x20	Sponsored Community Group Hangout
Booth Selection	First	Second	
Lead scanning licenses	Four	Two	Two
<b>NEW!</b> 1:1 Meetings with Advisors	10 scheduled in advance	5 scheduled in advance	x
Conference Registrations	10	4	4
Invitation to Sponsor Receptions with Orion Leaders	x	x	x
<b>NEW!</b> Invitation to Wealth Partner "track" (asset managers only)	x	x	x
<b>NEW!</b> Invitation to Tech Partner "track" (integration partners only)	x	x	x
Passes to access Elite Advisor event	2		
Access to Elite Advisor dedicated spaces	x	x	
Main Stage Speaking (15-minute fireside chat)	x		
Breakout Session	x	x	
Panelist Opportunity	x	x	
<b>NEW!</b> Moderate Community Group Roundtables	4 moderators	2 moderators	4 moderators
Choice of sponsorship on one of the following items (first-come, first-serve): Mobile App Home Screen, Conference WiFi, Registration Check-In Screen, Mobile App Gamification	x		
Logo placement on conference materials	x	x	x
Mobile app banner advertisement	x	x	
One targeted email sent to all attendees pre-con by Orion on your behalf	x		
Targeted pre-con email sent to your selected community group by Orion on your behalf	x		x
Push notification to all conference attendees	x		
Appreciation social post during conference	x		
"Blurb" in Orion client newsletter leading up to conference	x		
Pre-event and post-event conference opt-in attendee list, excluding email addresses	Including email addresses	Including email addresses	Including email addresses
Opportunity to provide promo item/gift in Elite Advisor Lounge	x		
<b>NEW!</b> 10% discount on any Ascent Events, Content or Connect Add-ons	x	x	x
Pre-Ascent introduction in virtual Community Group meeting	2 meetings		1 meeting
Invitation to community group sessions	x	x	x
Concierge coordination of dine-around (sponsor pays for meal)	x	x	
Dine-around host for 10-30 attendees (sponsorship includes the meal and logistics planning)			x

# 2026 Strategic Partnerships Menu

## **NEW!** Orion Community Groups

Quarterly Co-facilitator of Orion role-based Community group or wealth management community group

1 group of your choice

Annual Co-facilitator of Orion role-based Community group

1 group of your choice

## 2026 Events

Sponsorship of exclusive events

1

1

Sponsorship of standard events

2

10% discount on any additional sponsorships

x

x

x

## Orion Content and Marketing Opportunities

Targeted emails

2

1

Social media shares

1/quarter

Dedicated webinars

2

1

Featured content downloads in Orion Resource Center

1/quarter

2/year

Guest blog authored by sponsor, posted in Orion Resource Center

1/month

1/quarter

Guest opportunity in our ongoing content (webinars, podcasts, videos, etc.)

1

Dedicated partner page on orion.com

x

x

**NEW!** Salesloft templates to be distributed by Orion sales team

2

1

## Orion Advisor Academy

Featured provider of CE course (available for 3 years)

1/quarter

2/year

Opportunity to "own" a specific topic tied to your brand

x

Monthly list of opt-in enrollees in sponsored courses

x

x

Logo placement in select branding

x

x

Resource Center listing

x

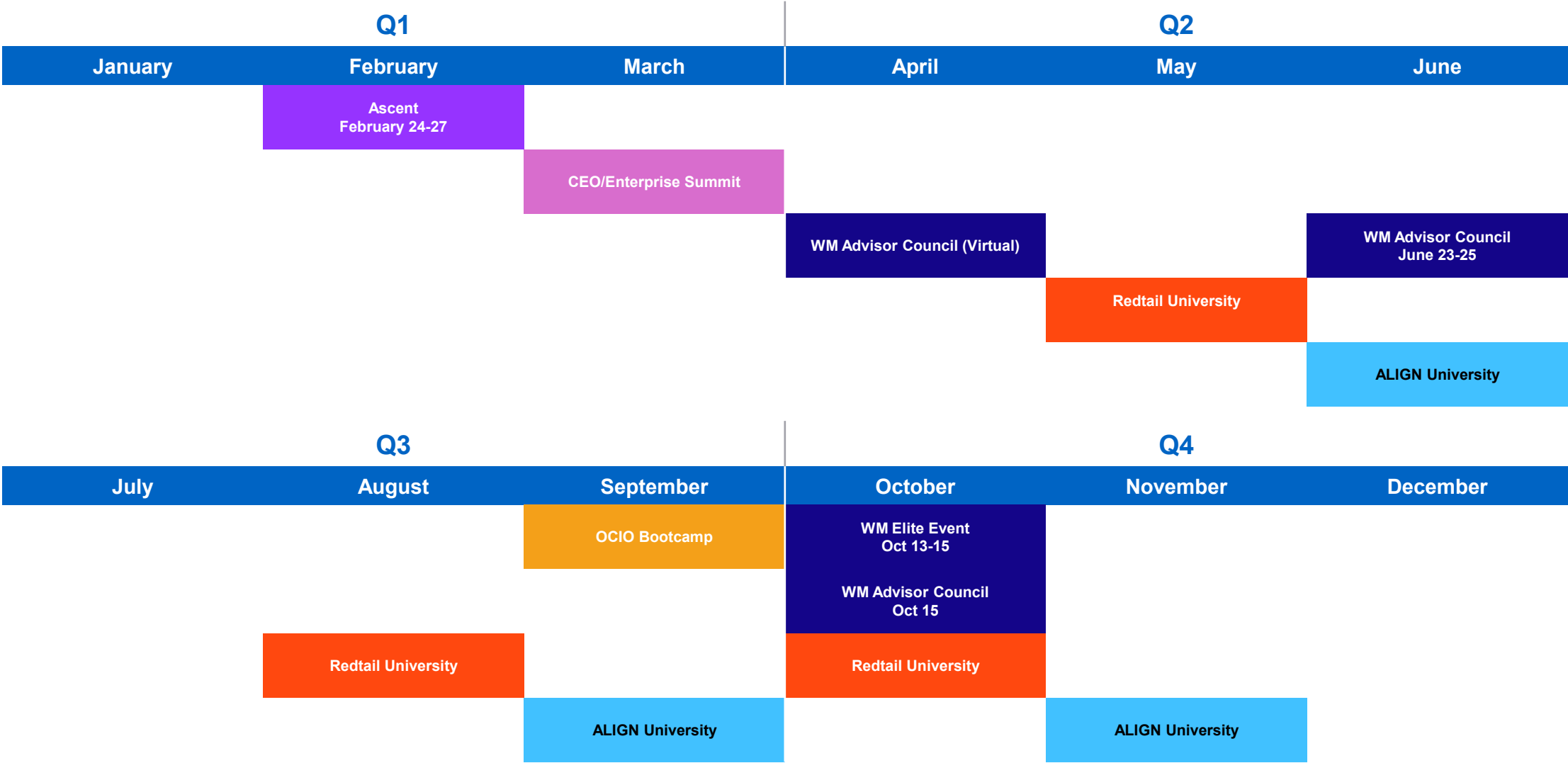
x

# 2026 Strategic Partnerships Menu

	Premier Partner (4)	Platinum Partner (4)	Community Partner (8)
<b>Wealth Management Data Package</b>			
OPS and Brinker proposals data	x	x	
<b>NEW!</b> Enhanced AUM and flows reporting	X		
Monthly “What’s Hot” analysis	x	x	
Reports available in your portal	x	x	
<b>Partner Support</b>			
Dedicated marketing manager to support success	x	x	x
Marketing planning meetings	Monthly	Quarterly	Bi-annually
Quarterly marketing engagement reports	x	x	
Monthly status report	x	x	
<b>Orion Team Access</b>			
30-minute 1:1 with Orion CEO	x		
30-minute 1:1 with one Orion exec or board member	x	x	
<b>NEW!</b> 30-minute "pitch" opportunity with either the head of proprietary investments or head of technology product	x		
<b>NEW!</b> Opportunity to attend in-person Ascent pre-con meeting with Orion sales team (wealth or tech)	x		
<b>NEW!</b> Targeted email and slack post to Orion sales team, posted/sent on your behalf by Orion	2	1	
Opportunity to attend one in-person Sales Meeting	x		
Opportunity to present at a virtual sales meeting	2	1	
Strategy meeting with Orion exec team	x		
Advanced insight into roadmap of Orion platforms	x		

# | Orion Event Sponsorships

# 2026 Events Calendar



Orion\*

# | Orion Ascent



# 2026 Ascent Overview

📍 **Marriott Marquis, San Diego Marina**  
 📅 **Tuesday, February 24- Friday, February 27**

## KEY DATES

**June 16**  
 Sponsorship Opens

**January 15**  
 Sponsorship Closes



# The Ascent Audience

## What is ASCENT?

Ascent is Orion's annual flagship conference, where the brightest minds in wealthtech and wealth management come together to shape the future of advice. Purpose-built for RIAs, dually registered firms, broker-dealers, trust companies, and strategic partners, Ascent attracts a powerful cross-section of the industry.

With participation from over 760 firms in the 2025 event—including leading RIA custodians, top-tier asset managers and a wide array of fintech innovators—Ascent is where thought leadership meets practical strategy. The event features world-class keynotes, high-impact educational presentations, role-based community groups, customized consultation appointments, and a buzzing exhibit hall with 100+ sponsors and exhibitors.

Named one of the best conferences for financial advisors by Michael Kitces, Ascent offers high-value engagement, peer connection, and a front-row seat to the technologies and trends transforming our industry.

## Why do advisors attend?

To connect—with peers, partners, and purpose. Advisors come to Ascent to share ideas, build community, and find inspiration in how others are personalizing advice, scaling impact, and shaping the future of client relationships.

To learn—not only through Orion, but with direct access to you—the critical ecosystem of partners helping advisors operate more efficiently and serve clients more meaningfully. Ascent equips advisors with practical strategies they can take back to their teams.

## What types of firms attend Ascent?

Ascent draws a diverse mix of advisory businesses—from solo advisors and emerging firms to national-scale RIAs, banks, trust companies, and dually registered enterprises. Firm sizes range from under \$100 million in AUM to over \$5 billion, with team sizes spanning from individual practitioners to firms with 50+ employees. Many are growth-focused, technology-forward, and looking to deepen client relationships, streamline operations, and expand their impact.



# 2025 Ascent

**\$1.1T** Attendee Assets on Orion Platforms

**1,804**  
Total Attendees

**69%**  
Tech Clients  
(Mainly RIAs, \$500M+)

**31%**  
Wealth Management  
Advisors



**107**  
Exhibitors & Sponsors

**637**  
Consultation  
Appointments

**125**  
Speakers with  
128 presentations

\*As of 2/6/2025

Called a **“best conference for financial advisors”** by Michael Kitces<sup>1</sup> and Three Crowns Marketing.<sup>2</sup>

<sup>1</sup>Source: [The 10 Best Financial Advisor Conferences To Attend In 2024](#), Kitces.com, 2023.

<sup>2</sup>Source: [Top 10 Conferences for Financial Advisors in 2024](#), Three Crowns Marketing, 2023.



ASCENT 2026

# Sponsorship Packages

## Supernova Sponsor

**\$80,000** (15 available)

### EXHIBIT

- 10x20 booth space with opportunity to purchase additional 10x10 units for additional fees
- Kiosk in Tech Village (integration partners only)\*\*
- Two lead scanning licenses included for booth

### ATTEND

- Six conference registrations (includes speakers)
- Opportunity to purchase up to four additional conference registrations at published rate
- Invitation to attend sponsor receptions
- **NEW!** Invitation to pre-con Wealth Partner or Tech Partner “track” featuring exclusive content and insights
- **NEW!** Four 1:1 Meetings with advisors scheduled in advance and opportunity to schedule more\*\*\*

### SPEAK

- **Breakout Session:** Opportunity to nominate a presenter for a 40-minute CE or Advisor-led session\*
- **Panelist OR Roundtable:** Opportunity to nominate 1 panelist for a 40-minute educational session\*
- **NEW!** Opportunity to moderate a 40-min community group roundtable session.

### PROMOTE

- Priority logo placement in select conference print, electronic and on-site branding
- Mobile app banner advertisement
- Pre-event and post-event conference opt-in attendee list, including email addresses

### ACCESS

- 30-minute 1:1 with a Senior Leader at Orion (SVP, EVP or above) via zoom prior to Ascent

### SUPPORT and Add-Ons

- Dine-around coordination concierge (sponsor pays for event)
- **NEW!** 10% discount on any Events, Content, or Connect add-ons

## Solar Sponsor

**\$55,000** (10 available)

### EXHIBIT

- 10x10 booth space
- Opportunity to purchase additional 10x10 units for additional fees

### ATTEND

- Four conference registrations (includes speakers)
- Opportunity to purchase up to four additional conference registrations at published rate

### SPEAK

- **Panelist OR Roundtable:** Opportunity to nominate 1 panelist for a 40-minute educational session\*
- **NEW!** Opportunity to moderate a 40-min community group roundtable session.

### PROMOTE

- Logo placement in select conference print, electronic and on-site branding
- Mobile app banner advertisement
- Pre-event and post-event conference opt-in attendee list, excluding email addresses

### SUPPORT

- Dine-around coordination concierge (sponsor pays for event)

## Lunar Sponsor

**\$30,000** (50 available)

### EXHIBIT

- 10x10 booth space

### ATTEND

- Three conference registrations
- Opportunity to purchase up to four additional conference registrations at published rate

### PROMOTE

- Logo placement in select conference print, electronic and on-site branding
- Pre-event and post-event conference opt-in attendee list, excluding email addresses

## Stellar Sponsor

**\$16,500** (35 available)

### EXHIBIT

- Kiosk in Tech Village\*\*

### ATTEND

- Two conference registrations
- Opportunity to purchase up to four additional conference registrations at published rate

### PROMOTE

- Logo placement in select conference print, electronic and on-site branding
- Pre-event and post-event conference opt-in attendee list, excluding email addresses

\* Topic, speaker, title and description to be agreed on with Orion  
\*\* Orion to assign kiosk location

\*Topic, speaker, title and description to be agreed on with Orion  
\*\*\* Priority access to scheduled 1:1 advisor meetings, with a minimum number of time slots reserved. While Orion facilitates scheduling, attendance is not guaranteed.

# Ascent 2026 Sponsorship Tiers at a Glance

	Supernova Sponsor (15)	Solar Sponsor (10)	Lunar Sponsor (50)	Stellar Sponsor (35)
	\$80,000	\$55,000	\$30,000	\$16,500
Booth	10x20	10x10	10x10	Kiosk
Lead scanning licenses	Two	One		
<b>NEW!</b> 1:1 Meetings with Advisors	4 meetings scheduled in advance	x		
Conference Registrations	6	4	2	2
Invitation to Sponsor Receptions with Orion Leaders	x			
<b>NEW!</b> Invitation to Wealth Partner "track" (asset managers only)	x			
<b>NEW!</b> Invitation to Tech Partner "track" (integration partners only)	x			
Breakout Session (CE or Orion advisor-led)	x			
Panelist Opportunity	x			
<b>NEW!</b> Moderate Community Group Roundtables	2 moderators	1 moderator		
Logo placement on conference materials	x	x	x	x
Mobile app banner advertisement	x			
Pre-event and post-event conference opt-in attendee list	including email addresses	including email addresses	excluding email addresses	excluding email addresses
<b>NEW!</b> 10% discount on any Ascent Events, Content or Connect Add-ons	x			
Invitation to community group sessions	x			
Complimentary concierge coordination of dine-around (sponsor pays for meal)	x			

# Additional Opportunities | Events & Content

## Exhibit Hall Demo

**\$10,000 (10 available)**

Maximize your visibility in the exhibit hall with a 20-minute presentation on a massive 8x20-foot LED screen.. These sessions take place during breakout blocks and include informal seating to encourage audience engagement. Whether you're launching new technology, educating advisors on your platform, or sharing thought leadership, you control the content and the message.

### Sponsorship Includes:

- One 20-minute LED screen presentation in the exhibit hall
- Session listed on the official Ascent agenda.

## Final Night Party Food Truck

**\$25,000 (4 available)**

Put your brand at the center of the final night's energy. Sponsor one of four high-traffic food truck experiences at the Ascent final night party—complete with seating and networking areas designed to draw a crowd. Attendees gather here to refuel, relax, and connect, making this a prime spot for visibility and engagement.

### Sponsorship Includes:

- Branded food truck activation during the final night party
- Dedicated seating and networking area featuring your brand
- Orion-provided promo item tied to the experience, approved by sponsor

## Multimedia Brand Package

**\$30,000 (3 available)**

Amplify your voice beyond the booth with a premium multimedia experience designed to capture your brand's story at Ascent—and extend its impact well after the event. This package combines on-site interviews with custom-branded video content that you can share across social and digital channels.

### Sponsorship Includes:

- One sit-down interview
- Booth/breakout B-roll
- One :30 hype-style video edited/produced on-site and ready to share by Day 2.
- Three 1-minute reel-style videos, produced post-show. One round of changes/edits.
- Orion to share one of your videos on social following the conference

## Professional Head Shots

**\$35,000 (1 available)**

Drive consistent traffic to your booth while offering one of the most valued services at the conference. Orion will fully manage a professional headshot station located at or near your booth—branded with your logo and signage. With a steady stream of attendees lining up for high-quality portraits, this activation ensures visibility, engagement, and a lasting brand impression.

### Sponsorship Includes:

- Professionally staffed headshot station coordinated by Orion
- Sponsor branding at the headshot experience location
- Placement designed to maximize booth foot traffic
- Full list of attendees who receive a headshot

## Communities After Hours Sponsorship

**\$5,000 (10 available – Limited to Strategist Partners on the Communities platform)**

Cap off Wednesday night at Ascent with one of our most popular events: *Communities After Hours*. Held immediately following the dine-arounds, this lively gathering brings together more than 400 advisors for entertainment, networking, and late-night fun.

### As a co-sponsor, you'll enjoy:

- **Prominent branded signage** at the event
- **Custom-branded cocktail** served at the bar
- **Branded cocktail napkins** distributed throughout
- Recognition in event materials and on-site communications

# Additional Opportunities | Connect

## 1:1 Appointments: \$5,000\*

Maximize your impact at Ascent by offering dedicated 1:1 meetings with attendees. Get access to Orion's appointment scheduling app. 1:1's will be promoted to attendees. Dedicated scheduling blocks are built into the agenda to ensure meaningful engagement.

### Sponsorship Includes:

- Listing as a 1:1 appointment option in the mobile app
- Five meetings scheduled in advance
- Participation during dedicated appointment windows on the conference agenda

## Round Table Moderator: \$10,000

Lead the conversation that matters most to your audience. As a Roundtable Moderator, you'll facilitate a scheduled breakout discussion with a group of your choice—either from Orion's Tech Community Groups or the Wealth Management Elite Advisor Network. Orion will organize the session and provide facilitation questions to guide a meaningful, peer-to-peer dialogue where your brand is naturally positioned as a thought leader.

### Sponsorship Includes:

- Choice of community group (tech or wealth)
- Moderation of one scheduled breakout roundtable
- Facilitation prep and logistics provided by Orion

## Community Group Dine-Around: \$20,000

Host a high-impact evening of conversation with a curated group of advisors from Orion's community networks. As the sponsor of a Community Group Dine-Around, you'll enjoy meaningful, small-group engagement over dinner—organized and coordinated by Orion. You choose the group (tech or wealth), and we handle the logistics, RSVPs, and restaurant arrangements.

### Sponsorship Includes:

- Exclusive dinner with a selected Orion community group or elite advisor network group
- Up to five sponsor representative attendees for high-touch networking
- Restaurant selection, logistics, and RSVPs managed by Orion
- Dinner cost included in sponsorship fee
- Recognition as the official dinner host on event materials
- Transportation is on your own (walk, uber, etc.)

\* Priority access to scheduled 1:1 advisor meetings, with a minimum number of time slots reserved. While Orion facilitates scheduling, attendance is not guaranteed.

# Additional Opportunities | Promotions

## Water Bottles: \$15,000 (1 available)

- Make a lasting impact by sponsoring the official water bottle at the conference. Your logo will be prominently displayed on every bottle ensuring repeated exposure throughout the event.

## Hotel Key Cards: \$15,000 (1 available)

- Unlock unparalleled brand exposure by sponsoring the hotel key cards. With your logo prominently displayed on every card, your brand will be in the hands of every attendee.

## Hotel Room Gift Drop: \$15,000 (2 available)

- Give Orion client attendees a surprise upon arrival by sponsoring a hotel room gift drop, creating a unique and memorable experience that best represents your brand. Giveaway item is an additional fee.

## Activation Bar \$30,000 (1 available)

- Attendees will associate you with firm's the featured food and drink throughout the event. Coffee, snacks, cocktails, and more will be distributed from this bar in the exhibit hall throughout the day and in the reception.

## Lanyards: \$20,000 (1 available)

- What better way to leave an impression than to see 2000+ participants wearing your firm's name/logo around their neck for the duration of the conference? Name badge lanyards are worn by each attendee to gain access to all conference events

## Environmental Branding: Cost Varies

- Integrate your brand into the very fabric of our event environment. Your branding will be prominently featured throughout the hotel, ensuring consistent visibility and engagement with all attendees, from the lobby to the event spaces. Inquire for opportunities and costs



# Orion\* | Exclusive Events

# Orion CEO Summit

## What is the Orion CEO Summit?

Launching in 2026, Orion's CEO Summit is an exclusive, invitation-only gathering of top enterprise CEOs shaping the future of wealthtech. Designed for a select group of 20–25 executives, the Summit brings together the most influential voices in the industry for two days of connection, insight, and inspiration alongside Orion's executive team.

Set in a private, premium location, the CEO Summit will offer a first look at Orion's long-term strategic vision, behind-the-scenes product innovation, and exclusive research on the forces driving transformation in wealth management. With thoughtfully curated experiences and ample space for candid discussion, peer connection, and strategic idea exchange, the CEO Summit is where the future of the industry takes shape—together.

## Why do CEOs attend?

To gain clarity, connection, and competitive advantage. The CEO Summit offers a rare opportunity for enterprise leaders to step away from the day-to-day and engage in high-level dialogue about where the industry is headed—and how to stay ahead.

CEOs attend to hear what's next from Orion, uncover emerging opportunities across wealthtech and financial services, and exchange ideas with peers navigating similar challenges at scale. It's time well spent with the people who shape the future—and understand the weight of leading it.

## What types of firms join?

The CEO Summit is built for enterprise-level firms at the forefront of wealth management, fintech, and platform innovation. Participating firms span custodians, broker-dealers, aggregators, RIA consolidators, banks, trust companies, and tech-forward investment platforms—all unified by their scale, influence, and shared commitment to advancing the advisor-client experience.



## Sponsorship Benefits

- 1 registration – C-level attendee
- Opportunity to nominate a panelist for an educational session
- Access to all content sessions and invitations to all meals, receptions and activities with attendees
- Branding at the event and in email communications
- Opt-in pre and post conference attendee list
- Opportunity to provide gift item to attendees

# Orion Wealth Management Elite Conference

## What is the Wealth Management Elite Event?

The Wealth Management Elite Conference is Orion's premier in-person event exclusively for OPS and Brinker Capital wealth management clients. This intimate gathering brings together approximately 125 top advisors with Orion's leadership, sales, and training teams for three days of collaboration, strategy, and connection.

Advisors engage in curated consultation appointments, thought-provoking sessions with internal and external experts, and hands-on learning with Orion's investment and technology tools. The experience is enriched by networking opportunities that take full advantage of the destination's unique offerings—creating space for meaningful relationships to grow in a relaxed, inspiring setting

## Why do advisors attend?

To connect—with like-minded peers, Orion leadership, and leading asset managers in a more personal, relaxed setting. The conference creates space for authentic conversation, idea-sharing, and long-term relationship-building.

To learn—through expert-led sessions, practical workshops, roundtables, and 1:1 consults with Orion's sales and training teams. Advisors walk away with actionable insights on client engagement, portfolio construction, behavioral finance, emerging wealth, and more.

## What types of firms join?

This invitation-only event is designed for Orion's most engaged wealth management clients—spanning a mix of registered reps and independent RIAs. These firms are growth-minded, client-focused, and committed to delivering elevated advice with the support of Orion's investment platform and services.



## Sponsorship Benefits

- 2 registrations
- Opportunity to nominate a panelist for an educational session
- Opportunity to moderate a round table session.
- Access to all content sessions and invitations to all meals and receptions with attendees
- Branding at the event and in email communications
- Opt-in pre and post conference attendee list

# Orion Wealth Management Advisory Council

## What is Advisory Council?

Orion's Advisory Council is a select group of top-tier clients from our TAMP platforms—Orion Portfolio Solutions and Brinker Capital—who collectively manage over \$3 billion in assets on our platforms. This trusted group acts as a strategic sounding board, providing early input, candid feedback, and collaborative problem-solving to help Orion continuously improve.

Council members meet twice in person and twice virtually each year, engaging directly with Orion's executives and senior leaders. They receive early access to key initiatives, help shape the product roadmap, and influence strategic priorities that impact the broader advisor community.

## Why do advisors join?

To have a voice—and to build community. Council members value the opportunity to shape Orion's roadmap, provide input on emerging ideas, and collaborate directly with Orion's senior leadership. Just as importantly, they form a tightly knit network of like-minded peers—advisors who are passionate about growth, innovation, and raising the bar across the profession.

Council participation is a year-long commitment, and many members choose to stay on for multiple years, deepening their relationships and continuing to help guide Orion's evolution.

## What types of firms join?

The Advisory Council includes a diverse mix of registered representatives and independent RIAs who are aligned in mindset: forward-thinking, growth-oriented, and deeply engaged in the advisor-client relationship. These firms span geographies, business models, and team structures—but all share a commitment to innovation, collaboration, and continuous improvement.



## Sponsorship Benefits

- Exclusive 30-minute session with Advisory Council members to introduce your firm, share insights, and receive direct feedback
- Sole sponsorship of the final night dinner, with recognition during the event
- Logo placement and sponsor recognition on the official agenda
- Invitation to all meals and networking events throughout the in-person meeting
- Opportunity to provide branded swag to all Advisory Council members
- Optional room drop opportunity (sponsor covers room drop fee)

# Orion<sup>\*</sup> | Standard Events

# Orion OCIO Bootcamp

## What is OCIO Bootcamp?

OCIO Bootcamp is a focused, one-day event designed exclusively for advisors utilizing Orion's OCIO services. Built to deliver meaningful connections and practical investment insights, the event brings together a select group of advisors and Orion's leadership for a fast-paced agenda packed with market updates, portfolio strategies, and hands-on application of tools and technology. From morning through evening, the Bootcamp offers the perfect blend of education and networking.

## Why do advisors attend?

Advisors come to OCIO Bootcamp to engage with experts, learn about portfolio positioning, explore OCIO-supported investment tools, and walk away with practical ideas to elevate their practice. It's also a rare chance to connect with like-minded peers in a smaller, more collaborative setting.

## What types of firms join?

OCIO Bootcamp draws primarily independent RIAs leveraging Orion's outsourced investment solutions. These firms are growth-minded, advice-forward, and eager to gain insights they can immediately apply to client portfolios and proposals.



## Sponsorship Benefits

- Exclusive 30-minute session with OCIO Bootcamp attendees to share your firm's perspective
- Sponsorship of the evening dinner, with verbal recognition during the event
- Logo placement and sponsor recognition on the official agenda
- Invitation to all meals throughout the in-person meeting
- Opportunity to provide branded swag to all attendees
- Opt-in attendee list, including email addresses

# Orion Wealth Management Territory Town Halls

## Regional Connection Points for Orion Clients

Territory Town Halls are half-day regional events designed to strengthen relationships with Orion's existing clients across the country. These intimate gatherings provide timely updates on Orion's platform evolution, offer valuable investment insights, and foster local community among like-minded advisors.

Led by Orion's sales and subject-matter experts, Territory Town Halls are an efficient and impactful way for advisors to stay informed, engaged, and equipped with actionable ideas to grow their practice.

## Why advisors attend?

- Stay up to date on Orion's latest product innovations and roadmap
- Gain timely insights through investment content and market commentary
- Ask questions and get real-time answers from Orion leaders
- Connect with peers in the same geographic region

## What types of firms join?

Territory Town Halls are open to Orion's current wealth management clients, with attendees typically including firm principals, investment professionals, and operational leaders across RIAs, hybrids and registered reps



## Sponsorship Benefits

- Logo placement and sponsor recognition on the official agenda
- Invitation to all content sessions and meals throughout the in-person meeting
- Opportunity to nominate a panelist for a session at the event
- Opportunity to provide branded swag to all attendees
- Opt-in attendee list, including email addresses

# Align University

## What is Align University?

Align University is Orion's premier hands-on training event designed to help advisors and their teams master the full potential of Orion and Redtail technologies. This two-day experience offers a customizable agenda, giving attendees the flexibility to focus on Redtail CRM, Orion's suite of tools, or a combination of both. Through interactive sessions, real-world applications, and one-on-one consultations with expert trainers, participants gain practical knowledge and strategic insight. They leave with the confidence and skills to turn their technology stack into an even more powerful engine—one that enhances client relationships, streamlines operations, and drives business growth.

## Why do Orion clients attend?

Attendees join Align University to get hands-on training tailored to their specific role, access live consultations with experts, and collaborate with peers facing similar challenges. Whether learning how to streamline daily workflows or connect Redtail and Orion features for more seamless service, participants gain both practical knowledge and a broader view of how to drive impact through better technology use.

## What types of firms join?

Align University welcomes team members from Orion and Redtail client firms—often operations staff, client service professionals, and advisors seeking more hands-on, specialized training. Whether part of a solo practice or a larger firm, attendees come to sharpen their skills, troubleshoot real workflows, and deepen their platform knowledge. The event also includes time for 1:1 appointments with Orion and Redtail experts to ensure personalized support and practical takeaways.



## Sponsorship Benefits

- 10-minute educational presentation during lunch
- Logo, company blurb, and link on the Align website
- Sponsor table at the event for direct engagement with attendees
- Inclusion in pre- and post-event promotional emails
- Logo placement and verbal mention during opening remarks
- Post-event opt-in attendee list with contact information
- Opportunity to provide branded swag in welcome bags
- One appreciation social media post during conference
- Opportunity to moderate a roundtable discussion in the strategy room
- Co-sponsored cocktail reception



# Redtail University

## What is Redtail University?

Redtail University is a high-energy, in-person training experience designed to help Redtail CRM users build confidence, improve efficiency, and fully leverage the platform's capabilities. Known for its fun, fast-paced environment and hands-on approach, RTU brings together users from across the country to deepen their product knowledge and connect with the Redtail team.

## Why do clients attend?

Attendees come to Redtail University to gain practical, role-based training that they can immediately apply in their day-to-day work. The experience blends technical instruction with real-world use cases, peer learning, and direct access to Redtail experts. For many, it's also an energizing opportunity to step away from the office and return with new insights—and new enthusiasm—for how technology can help them serve clients more effectively.

## What types of firms join?

A mix of RIAs, hybrid firms, and registered reps attend Redtail University, often sending operational team members, CRM administrators, and client service staff. Some attendees are new to the platform, while others return year after year to sharpen their skills, stay current with updates, and discover new tips to improve their workflow.



## Sponsorship Benefits

- 10-minute educational presentation during lunch
- Logo, company blurb, and link on the RTU website
- Inclusion in pre- and post-event promotional emails
- Logo placement and verbal mention during opening remarks
- Post-event opt-in attendee list with contact information
- Opportunity to provide branded swag in welcome bags
- Opportunity to moderate a roundtable discussion in the strategy room