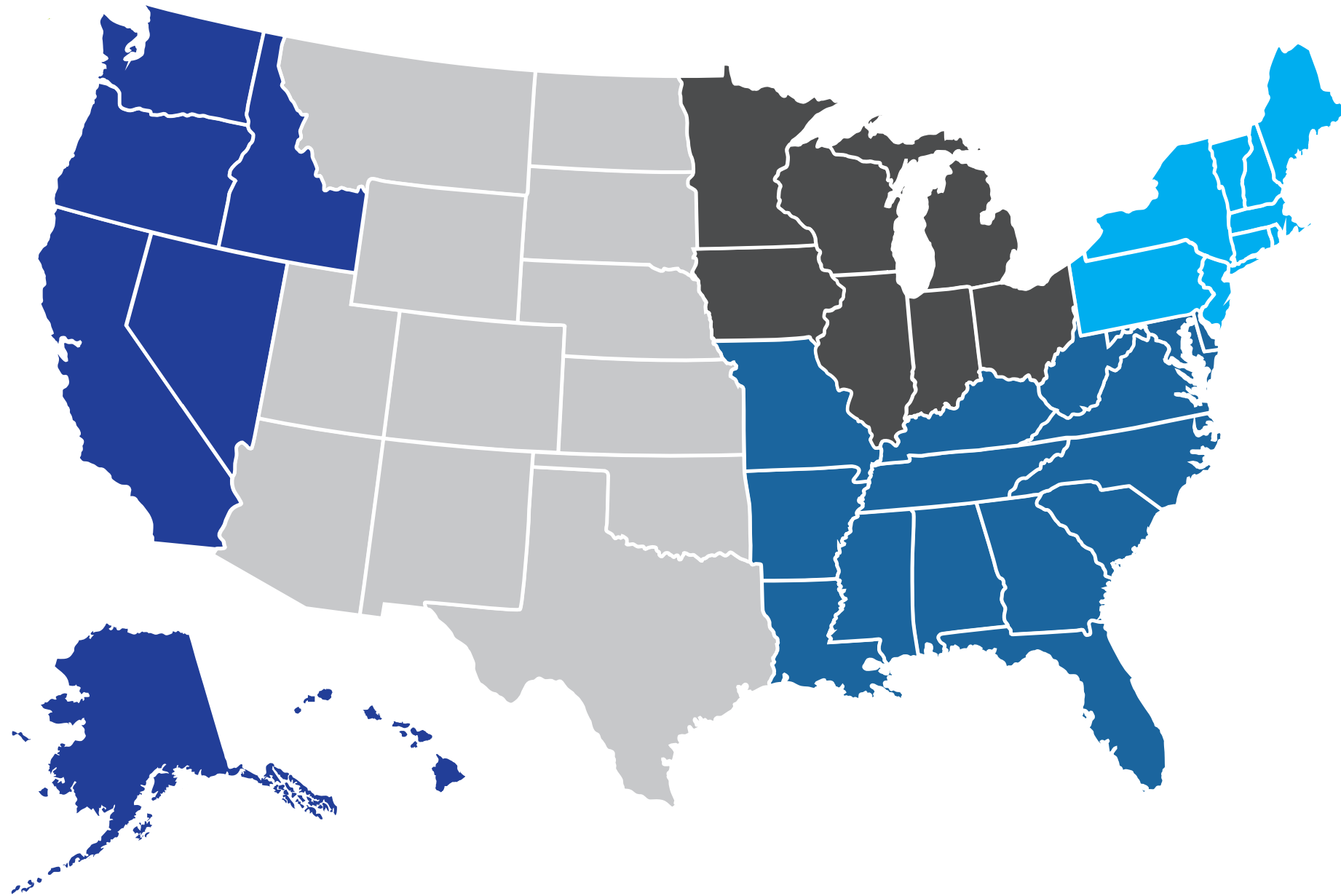
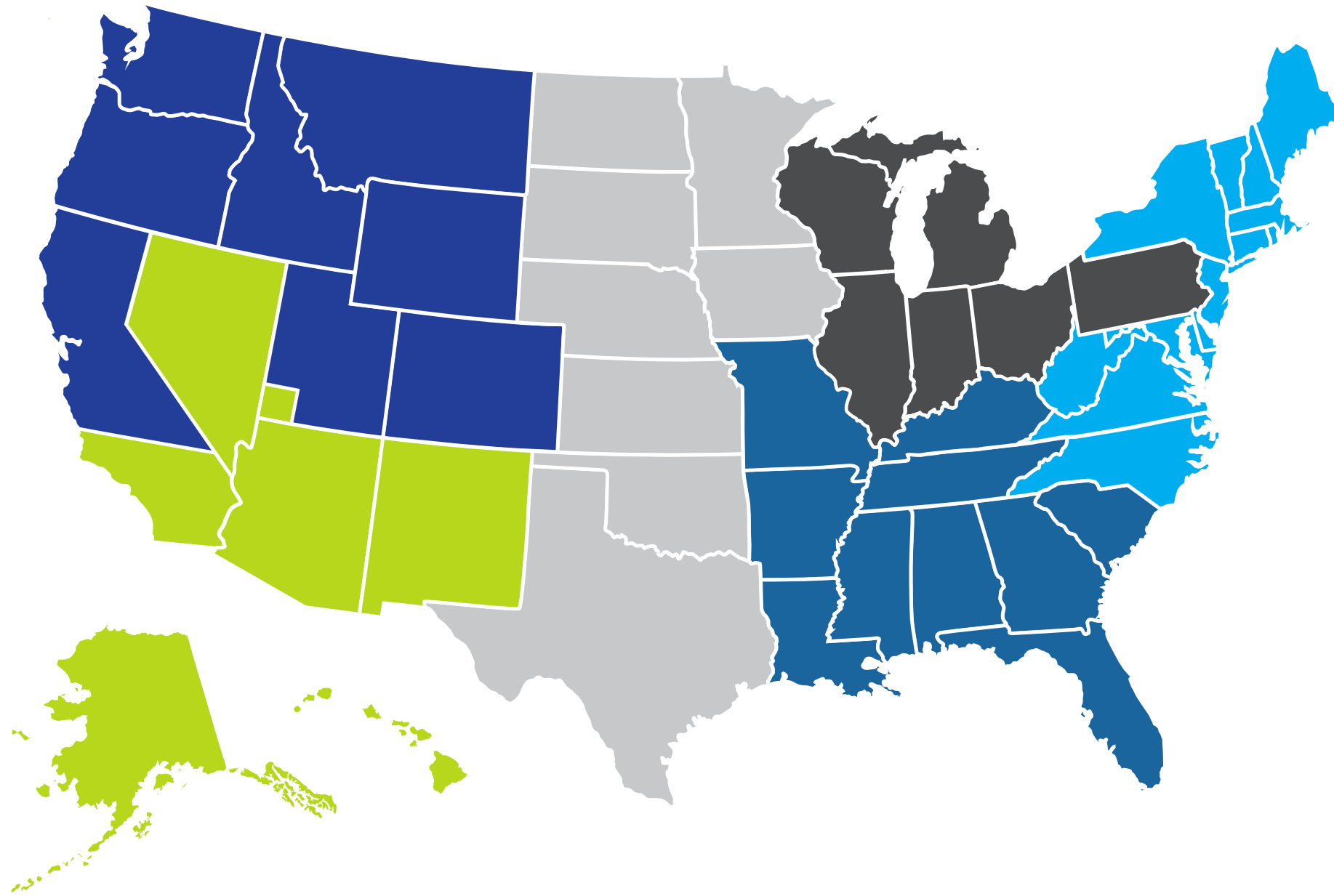


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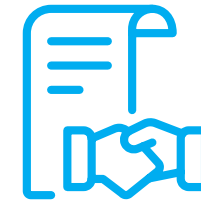
Assess

Evaluate the firm's existing processes and workflows and discuss business goals



Update

Communicate and demonstrate platform enhancements and new features



Support

Provide contract and pricing support for Orion's core offering and additional products



Advocate

Oversee and help to resolve escalated cases and discussions



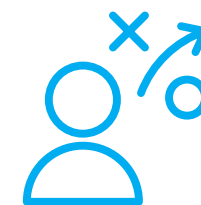
Advise

Deliver high-level consulting services via Orion's proven process



Promote

Elevate platform utilization by promoting Orion's technology to advisors via distribution content



Coach

Provides a high level of accountability and supports advisors in achieving their goals



Align

Ensure firm is utilizing the most befitting of Orion's technology to drive their growth and profitability