



**ASCENT 2026 AGENDA**

# CTOs and Product Leaders

A tailored agenda to help you maximize your conference experience, designed with your unique role and goals in mind.

[orion.com/ascent](https://orion.com/ascent)

## PRE-CONFERENCE EXCLUSIVE

### AI Workshop

Ready to put artificial intelligence to work for your advisory business? Join us for a hands-on, pre-conference workshop where you'll learn how to design and deploy AI-powered agents and automations to solve real business challenges — no coding required. Whether you're looking to streamline client onboarding, automate prospect outreach, or create smarter workflows, this session is for you.

Guided by a leading expert from the world of AI and automation (stay tuned for a big-name announcement soon!), you'll:

- Discover what's possible with AI-powered agents and business automations
- See real-world use cases from top advisory firms
- Get step-by-step guidance to build and test using Orion's newest AI innovation.
- Walk away with practical templates, starter ideas, and a roadmap for continued innovation

Bring your curiosity and your business challenges — we'll provide the tools and inspiration to help you become your own AI architect. No technical experience necessary. Leave this workshop empowered to leverage AI in your firm and deliver a new level of efficiency and client experience.

### Beyond the Buzz: Real AI Use Cases Driving Advisor Growth

AI isn't just a trend — it's a tool for transformation. In this session, we'll spotlight how forward-thinking firms are applying AI to streamline operations, personalize client experiences, and scale faster. Walk away with a view of what's working, what's just hype, and how to start.

### Signals and Systems: Building the Infrastructure for Predictive Growth

Your firm is sitting on a mountain of data — but is it working for you? Learn how to move from fragmented spreadsheets and disconnected systems to an integrated data strategy that powers personalization, fuels insights, and drives growth. The future of advice is proactive, not reactive. This session explores how firms layer data science and AI on top of operational systems to identify growth signals, anticipate client needs, and make smarter decisions.

### Orion Technology Roadmap 2026: Innovation, Integration & Impact

Join Orion's product and technology leaders for an exclusive first look at the future of the Orion platform. In this client-centric session, we'll walk through high-value recent enhancements, unveil what's coming in 2026, and share our vision for unified advisor and client experiences. You'll hear how Orion is prioritizing client feedback, leveraging AI, and building open architecture solutions to deliver more integration, automation, and actionable insights than ever before. Don't miss your chance to engage directly with Orion's leadership, ask questions, and see how the roadmap will help your firm stay ahead in a rapidly evolving industry.

## The Best of Both Worlds: Harnessing the Power of Orion Advisor Portal and Redtail

Discover how the integration of Orion's Advisor Portal and Redtail CRM creates a powerhouse combination to support your entire client lifecycle and practice operations. In this session, you'll learn how to navigate both platforms in tandem, streamline your daily processes, and deliver a personalized, seamless client experience—unlocking the full potential of your tech stack.

## CTO Circuit

Technology leaders are at the center of transformation across advisory firms — and the CTO Circuit is where they connect.

Join your peers and Orion's new Chief Technology Officer, Valli Nachiappan, for a high-impact session designed exclusively for technology executives and innovation leads. This is your forum to exchange ideas, surface common challenges, and explore solutions across architecture, data strategy, AI adoption, cybersecurity, and advisor-facing tech.

If you're building the tech foundation of the modern advisory firm, this is your circuit.

## A CISO-Led Conversation for the RIA & Broker-Dealer Community

In today's environment of accelerating digital risks, cybersecurity is no longer just an IT issue—it's a business-critical imperative. From data breaches to ransomware to SEC regulations, advisory firms of all sizes are increasingly in the crosshairs.

Join Orion's Chief Information Security Officer and a powerhouse panel of security leaders from top consulting firms, private equity-backed firms, and RIAs to uncover how the wealth industry is adapting its defense strategies. Learn how CISOs think about firm-wide risk, what new regulations (like SEC's Cyber Rule) mean for your compliance and operations, and how to embed a culture of security that protects your advisors, clients, and reputation.



Ascent 2026 is your chance to sharpen your skills, stay ahead of key industry shifts, and connect and learn from your peers. Don't miss this opportunity to expand your knowledge and spur growth for your business.