



**ASCENT 2026 AGENDA**

# Investment Officers and Analysts

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

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#### PRE-CONFERENCE EXCLUSIVE

### Trade Smarter, Move Faster: Optimizing Eclipse from the Ground Up

Get a head start with this focused training designed to help you take control of your Eclipse environment and trade with confidence. We'll kick things off by helping you customize your setup for clarity and control, because the key to relentless execution is a workspace that works for you.

From there, we'll dive into real-world trading challenges and show you how to manage cash at scale, rethink your model structures, and get the most out of the Eclipse Rebalancer. Whether streamlining daily tasks or leveling up your firm's trading strategy, this session gives you the tools to trade smarter and move faster without burning out your team.

You'll leave with:

- A cleaner, more efficient dashboard that matches how you work
- Strategies for managing complex cash flows with confidence
- A clearer path to evolving your models over time
- A deeper understanding of what drives Eclipse's core trade logic

Come ready to ask questions, test ideas, and refine your workflows, because trading success isn't just about speed, it's about building a system that's built to last.

### Alts, Crypto & the Evolving Definition of Diversification

Alternative investments and digital assets are no longer on the fringe—they're reshaping the conversation around diversification and long-term portfolio construction. In this candid discussion, asset managers, analysts, and forward-thinking advisors unpack what's real, what's speculative, and what belongs in a modern investment strategy. We'll cover allocation frameworks, regulatory developments, and how to educate clients without fueling hype. If you're fielding questions from curious clients (or curious yourself), this session is your reality check and roadmap.

### CIO Signal

Join fellow Chief Investment Officers, investment leads, and strategy-minded professionals for a candid, forward-looking conversation inside Orion's CIO Signal Community Group. This in-person session will be facilitated by Orion's Chief Investment Officer, Tim Holland, and offers a unique opportunity to exchange insights with peers who are shaping portfolio strategy, navigating market volatility, and managing firm-level investment philosophy.

Expect timely discussion on macro trends, investment product innovation, and the evolving role of the CIO. Whether you're managing models in-house, leveraging OCIO services, or overseeing third-party strategist access, this session is designed to equip you with fresh perspective — and signal what's ahead.

Collaborate. Learn. Lead with confidence.

### **Tech Demo: Proposal Tools & Orion Compare - Closing the Gap from Plan to Action**

Demo side-by-side comparisons, proposals, before-and-after scenarios, and AI-powered tools that bring clarity to clients and confidence to advisors. This session will show how to turn financial conversations into powerful visual experiences that help clients see the impact of their choices. Whether you're reallocating portfolios, adjusting risk, or planning a new strategy, these tools support fast, informed decisions. From discovery to delivery, you'll have everything you need to keep momentum and move clients forward.

### **A Breath of Fresh Air: Risk Intelligence Unpacked**

Explore how Orion's evolving risk technology can help you uncover deeper insights, enhance portfolio analysis, and support stronger client strategies. In this session, hear how one firm is using key tools and reporting enhancements to bring clarity to risk and empower more resilient decision-making.

### **Tech Demo: Custom Indexing in Real Life**

Go beyond theory with a hands-on look at how Orion Custom Indexing handles tax transitions, ESG screens, capital gain budgets, and concentrated positions. This demo breaks down complex customization into easy steps that advisors can implement at scale. You'll see how personalized portfolios can meet both values-based and tax-sensitive needs without increasing workload. It's a flexible and cost-effective solution that integrates cleanly into your existing tech stack



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.

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Custom Indexing offered through Orion Portfolio Solutions, LLC a registered investment advisor.

Custom Indexing is an investment strategy wherein a portfolio is managed to mimic an index or other portfolio, while taking into account the tax position, holdings, and individual investing preferences of a client. The performance of a portfolio using custom indexing may vary significantly from the target index (referred to as tracking error or tracking difference), and this variance may increase with greater customization within a portfolio.

Tax-loss Harvesting is a process by which securities trading at unrealized losses are sold to realize a taxable loss. Proceeds from the sales are then used to reinvest in alternate securities to maintain market exposure. Tax-loss Harvesting can be used as a strategy to offset realized gains from other investments and/or carried forward to later calendar years to offset future taxable gains.

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