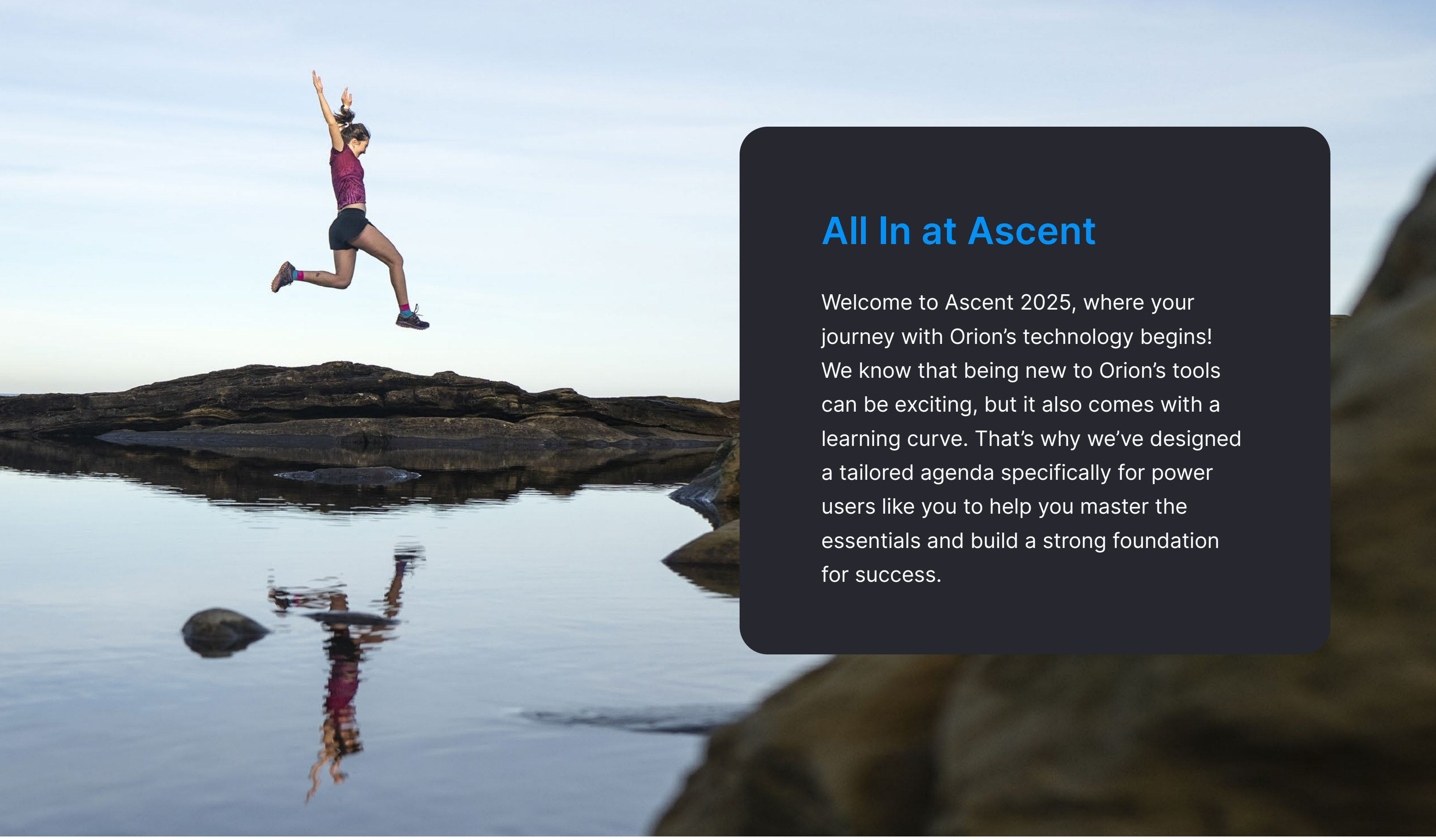
# Go All In on Your Ascent 2025 Experience

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



## All In at Ascent

Welcome to Ascent 2025, where your journey with Orion's technology begins! We know that being new to Orion's tools can be exciting, but it also comes with a learning curve. That's why we've designed a tailored agenda specifically for power users like you to help you master the essentials and build a strong foundation for success.

PERSONA OVERVIEW

# Power Users: Orion Technology

This agenda is perfect for those just starting with Orion's technology. You'll dive deep into the basics with Tech Training 101, 201, and 301 sessions, learn the fundamentals you need to support your business's necessary operations, and have the opportunity to attend meetups with fellow new users. We'll help you get up to speed and show you how to take full advantage of Orion's powerful features and functionality.

LET'S DIVE IN

PRE-CONFERENCE EXCLUSIVE

## New User Training: Orion Advisor Technology

Kickstart 2025 with our pre-conference training camp tailored specifically for new users of Orion Advisor Technology.

This comprehensive, 4-hour workshop is designed to provide an in-depth, hands-on deep dive into Orion's powerful technology suite. Join our expert trainers as they guide you through the advanced features and functionalities of Orion Advisor Technology.

Through practical exercises, interactive demonstrations, and detailed tutorials, you will gain a thorough understanding of how to leverage Orion's tools to enhance your business. This session will cover everything from how to get started to achieving power user status, ensuring you leave with the confidence and expertise to utilize Orion Advisor Technology to its fullest potential.

Get the opportunity to ask questions and receive personalized guidance from our knowledgeable trainers. Don't miss this chance to significantly enhance your proficiency with Orion Advisor Technology and set yourself up for success at Ascent 2025 and beyond.

## Unlocking Peak Trading Performance: Mastering the Tactical Trade Tool

Elevate your trading game with the Orion Tactical Trade Tool, your ultimate resource for refining trading strategies and boosting efficiency. In this session, explore the tool's powerful features — including model insights, cash management, trade generation, and gain/loss tracking. Discover how to effectively navigate and analyze the tool's data to streamline your trade reviews and enhance your trading tactics. Gain actionable tips and best practices to maximize your trading performance and achieve greater results.

## Optimize Your Operations: Streamlining Back-Office with Advisor Portal

Feel like you're missing the tools and insights needed to maximize the potential of your back-office setup? Dive into our dynamic, hands-on session where you'll uncover the secrets to supercharging your back-office with Advisor Portal. Experience a step-by-step walkthrough to tailor and optimize your setup specifically for your business needs. Discover insider tips, proven best practices, and innovative strategies to streamline workflows and boost efficiency. Say goodbye to back-office hassles and hello to a smoother, more effortless daily routine!

## Going Beyond the Basics: Supercharging Compliance with Orion's Cutting-Edge Features

Take your compliance practice to new heights with a look at Orion Compliance's advanced features, including Supervision, Drift, Trust Accounting, and much more. Discover how to obtain a comprehensive overview of client activity, how to stay ahead with real-time risk alerts, and streamline essential account reviews. In this session, you'll learn to harness these tools to boost accuracy, optimize workflows, and reduce conflicts of interest at scale. With robust end-to-end workflows and on-demand reporting, you'll be ready to elevate your compliance strategy and drive greater efficiency.

## Mobile Management Made Easy: Highlights of Orion's Mobile Features

Imagine your clients effortlessly managing their finances from anywhere — with Orion Wealth Management Portal, this is a reality. Explore how Orion's mobile app brings essential financial tools directly to your client's mobile devices. We'll walk you through the easy customization process for branding the app for your business, giving clients seamless 24/7 access to their financial data. Best of all: you'll learn firsthand how this innovative solution easily enhances client engagement and delight!

## Risk It Right: Transform Your Strategy with Orion's Advanced Analytics

How would elevating your risk management with advanced analytics reshape your strategy? In this session, explore how Orion's Risk Intelligence leverages state-of-the-art analytics and dynamic risk profiling to enhance your approach. Discover how to evaluate client risk tolerance with precision, align portfolios to meet goals, and stay ahead of market fluctuations. Learn to harness this tool to craft personalized, data-driven strategies that drive client success and manage risk effectively in today's fast-moving financial landscape.

## From Blah to Brilliant: Creating Impactful Reports with Orion's Report Builder

Transform your client reports from routine to remarkable with ease! Dive deep into the powerful features of the Orion Report Builder and learn how to create visually stunning and highly customized reports that resonate with your clients.

Whether you're a seasoned user or new to the platform, this session will guide you through:

- **Building from the Ground Up:** Learn the basics of Report Builder, including how to set up your initial report structure and incorporate essential data.
- **Styling Techniques:** Discover tips and tricks for customizing the look and feel of your reports, from selecting color schemes to choosing fonts that enhance readability.
- **Advanced Customization:** Explore advanced features like sub-report templates, including allocation pie charts, tables, and holdings sections, to add depth and detail to your reports.
- **Enhancing with Visuals:** Add a professional touch by integrating a Table of Contents and other visual elements to make your reports more navigable and visually appealing.

By the end of this session, you'll walk away with a comprehensive understanding of how to craft personalized, impactful reports that not only meet but exceed your clients' expectations.

## The Data Revolution: Supercharge Your Orion Management and Organization

Transforming organized chaos into clear, actionable insights is within your reach. Discover how to elevate your data management with Orion's proven strategies.

In this session, we'll explore:

- **Precision in Data Handling:** Learn essential techniques for ensuring your data is accurate, reliable, and ready for action.
- **Streamlined Workflows:** Discover how to optimize your data processes for maximum efficiency and effectiveness.
- **Insight-Driven Decisions:** Leverage powerful analytics to drive smarter business choices and achieve your goals.

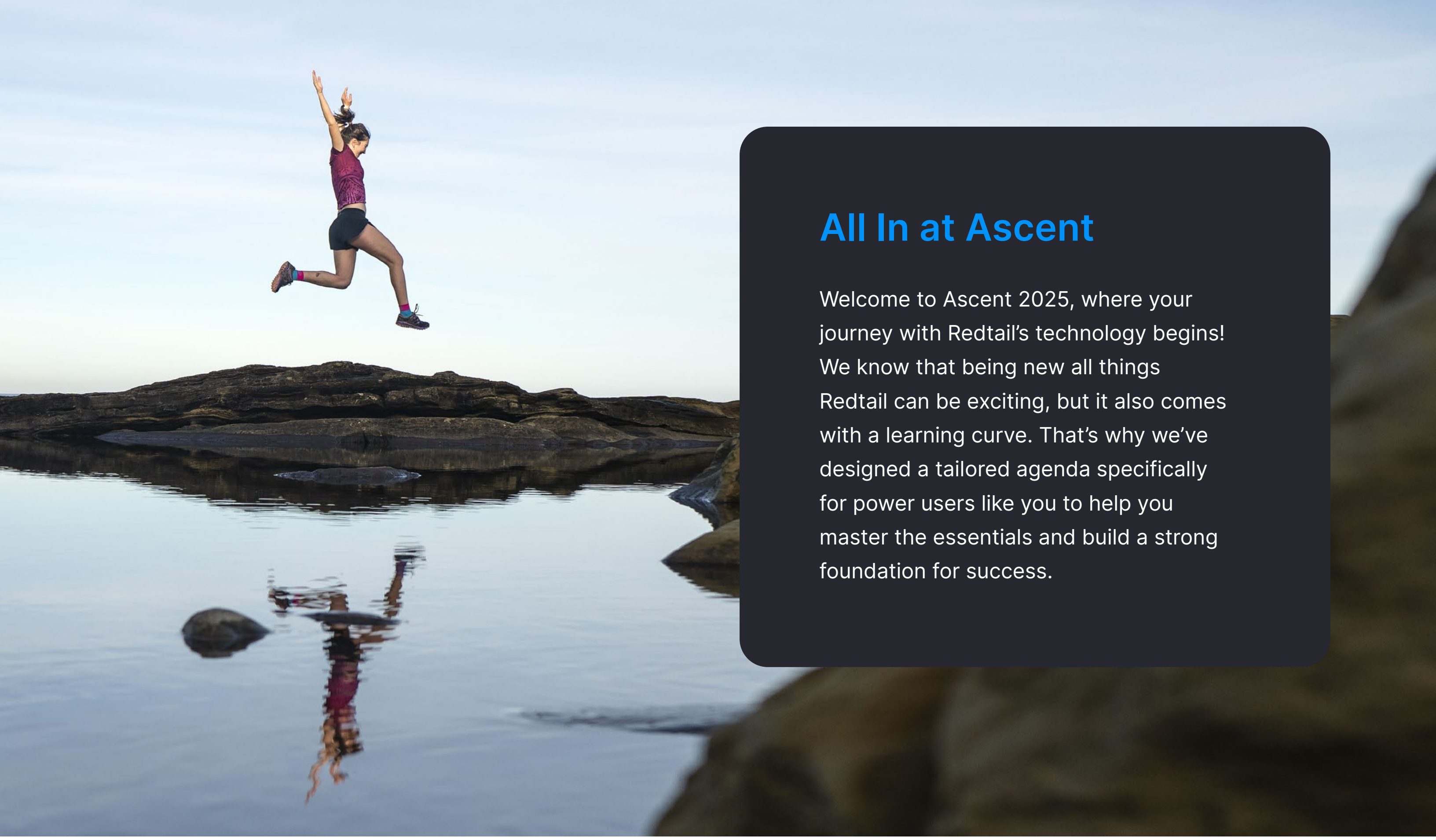
Embrace a new era of data clarity and organization and see how Orion's strategies can revolutionize your approach.


FIRST LOOK

## Product Demos

Be among the first to see and experience Orion’s newest technology, right there with the people who design and develop it to transform your business. Ask questions, explore the opportunities, and get excited for everything coming next.

At Ascent 2025, we’re committed to helping you succeed right from the start. Whether it’s through practical tech training or connecting with peers, this agenda is designed to ensure you leave feeling confident in your ability to leverage Orion’s technology for your firm. Register today and start your journey with Orion on the right foot!



## All In at Ascent

Welcome to Ascent 2025, where your journey with Redtail's technology begins! We know that being new all things Redtail can be exciting, but it also comes with a learning curve. That's why we've designed a tailored agenda specifically for power users like you to help you master the essentials and build a strong foundation for success.

PERSONA OVERVIEW

# Power Users: Redtail Technology

This agenda is perfect for those just starting with Redtail. You'll dive deep into the basics with Tech Training 101, 201, and 301 sessions, learn the fundamentals you need to support your business's necessary operations, and have the opportunity to attend meetups with fellow new users. We'll help you get up to speed and show you how to take full advantage of everything awesome about Redtail.

LET'S DIVE IN

PRE-CONFERENCE EXCLUSIVE

## New User Training: Redtail

Level up your business early in 2025 with our pre-conference training camp, designed specifically for new users of Redtail CRM. A concentrated version of the popular Redtail University, this comprehensive, 4-hour workshop provides an in-depth, hands-on exploration of all things Redtail.

Join our expert trainers as they lead you through the advanced features and functionalities of Redtail CRM. Through practical exercises, interactive demonstrations, and detailed tutorials, you will gain a thorough understanding of how to leverage Redtail's tools to enhance client relationships and streamline your practice.

This session will cover everything from basic setup and navigation to advanced customization and automation options, ensuring you leave with the confidence and expertise to utilize Redtail CRM to its fullest potential.

Plus! Get your questions answered and receive personalized guidance from our knowledgeable trainers. Don't miss this chance to significantly enhance your proficiency with Redtail CRM and set yourself up for success at Ascent 2025 and beyond.

PRE-CONFERENCE EXCLUSIVE

## Deep Dive Training: Winning Redtail Workflows

It's time to truly maximize your client data. In this interactive, comprehensive workshop, you'll learn how to build and manage automated workflows designed to help you banish manual work and seamlessly integrate data-driven strategies into your client management, boosting efficiency and enhancing personalized service.

## From 5 to 95: Harnessing the Power of the CRM

Transform your CRM from a basic contact manager into a dynamic engine for growth — going all-in on every feature! In this energizing session, you'll learn how to build a robust Style Guide, keep your data in top shape, and harness key features to streamline your workflow. We'll dive into the art of customizing fields, mastering contact filters, and generating powerful reports that give you a competitive edge. Perfect for those new to CRM or looking to strengthen their foundation, this session will help you commit fully to turning your CRM into the ultimate tool for driving your business forward!

## Elevate and Energize: Next-Level Client Review Strategies

Transform your client reviews into high-impact conversations that drive results. In this training session, you'll dive into strategies that elevate your approach, turning routine reviews into powerful, relationship-building opportunities that are personalized and productive. Discover how to leverage your Redtail CRM, communicate insights clearly, and create actionable plans that resonate with your clients and drive their (and your) success.

## Client Communication Optimized: The Redtail Playbook for Effective Documentation

Step up your client game with Redtail's ultimate playbook. Dive into the process of building a dynamic documentation library with Redtail Imaging and explore how compliant texting via Redtail speak can streamline your interactions. Learn essential strategies and best practices to make your communication seamless and secure, tailored to your clients' needs. By the end of this session, you'll be equipped to transform your approach and set new standards in client engagement and documentation.

## Navigating Client Challenges: Effective Care with Redtail CRM

When life throws your clients its toughest challenges, your response can make all the difference. In this session, we'll explore how to confidently manage sensitive situations, life death and divorce, using Redtail CRM. Learn how to turn these difficult moments into opportunities for deepening client trust and providing unwavering support. With the right tools and strategies at your fingertips, you'll be equipped to guide your clients through life's most challenging times with care, compassion, and confidence.

## Insight to Impact: Personalizing Client Engagement with Orion BeFi Tools

Elevate your client relationships and set your firm apart by leveraging Orion's powerful behavioral finance tools. This session will guide you in using BeFi20, 3D Risk Profile, Protect, Live, Dream, and PulseCheck to uncover your clients' financial dispositions and tailor your advice accordingly. Learn how to deepen connections through personalized coaching and create financial plans that resonate on a personal level. Don't miss this opportunity to transform insights into impactful client experiences that drive loyalty and long-term success.

## Engagement Elevated: Uniting Orion's Portal and Planning with Redtail

Supercharge your Redtail CRM by seamlessly integrating Orion's Client Portal and Planning features. This session will show you how to enhance client engagement and streamline your workflow, all within the familiar Redtail environment. Discover the tools and strategies to provide a personalized, efficient experience that keeps your clients connected and your firm ahead of the curve. Don't miss out on learning how to turn your CRM into a powerhouse of client satisfaction and growth.

### Turning Transactions Into Trust: The All-In Path to Stronger Relationships

According to a 2015 study* by Harvard Business Review, clients who go from feeling “highly satisfied” to “fully emotionally connected” increase in value by a staggering 52%! How do you get there? By building deeper, more meaningful connections with them. If you want to go all in on your client relationships to set you both up for growth, you can’t miss this session. You’ll learn all the ways your Redtail CRM can make it easier than ever for you to personalize your client’s experience with you. We’ll compare proactive and reactive approaches, showing how anticipating needs and addressing issues early strengthens relationships versus merely reacting to concerns. You’ll also learn how managing expectations through clear communication and training empowers you and your team to deliver consistent, high-quality client experiences — and, most importantly, you’ll create raving fans for your business.

*Source: The New Science of Customer Emotions, Harvard Business Review, 2015.


FIRST LOOK

## Product Demos

Be among the first to see and experience Orion’s newest technology, right there with the people who design and develop it to transform your business. Ask questions, explore the opportunities, and get excited for everything coming next.

At Ascent 2025, we’re committed to helping you succeed right from the start. Whether it’s through practical tech training or connecting with peers, this agenda is designed to ensure you leave feeling confident in your ability to leverage Redtail technology for your firm.

# About Orion

Orion is a premier provider of the tech-enabled fiduciary process that transforms the advisor-client relationship by enabling financial advisors to Prospect, Plan, Invest, and Achieve within a single, connected, technology-driven experience. Combined, our brand entities, Orion Advisor Tech, Orion Portfolio Solutions, Brinker Capital Investments, Redtail Technology, and Orion OCIO create a complete offering that empowers firms to attract new clients seamlessly, connect goals more meaningfully to investment strategies and outcomes, and ultimately track progress toward each investor's unique definition of financial success. Orion services $4.4 trillion in assets under administration and $69.4 billion of wealth management platform assets (as of June 30, 2024) and supports over six million technology accounts and thousands of independent advisory firms. Today, 17 out of the Top 20 Barron's RIA firms[1] rely on Orion's technology to power their businesses and win for investors.

## Don't Work With Us Yet?
**Let's Change That.**


→ **CALL**

402.496.3513

→ **EMAIL**

info@orion.com


**Visit Us Online**

1 Source: 2024 Top 100 RIA Firms, Barron's, 2024

Orion Behavioral Finance ("Orion BeFi") is the branding name of various tools and services related to behavioral finance offered by Orion Advisor Solutions, Inc. and its subsidiaries. Orion BeFi tools are crafted to help investors and their financial advisors integrate behavioral psychology research into their investment decisions. Orion BeFi tools and services do not provide investment advice.


2583-OAS-ASC-10/8/2024


ORION