Orion | ASCENT

ASCENT 2026 AGENDA

Orion Tech Power Users

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.

Redtail + Orion Tech Integration (in-depth) - Better Together: Uniting the Power of Orion and Redtail for a Seamless Client Experience

Delivering tax-smart, personalized portfolios has never been easier—or more affordable. In this live walkthrough, see how Tailored Allocation Portfolios (TAP) enables you to transition client accounts into ETF model portfolios managed by leading strategists, all within your existing Orion workflow. Learn how to reduce concentrated risk, preserve after-tax returns, and scale a premium investment experience—without adding costs to your client or complexity to your day.

Simplify the Story: Building Reports That Make Sense of It All

This session is designed for Orion power users who build custom reports that unify financial planning, performance metrics, and holdings data into a single, client-ready narrative. Learn how to harness Orion's reporting tools to transform complex data into confident, actionable insights that resonate with clients.

Workflow Smarter: Customizing and Scaling Redtail for Your Practice

Redtail Workflows are powerful tools that help streamline and standardize processes across your financial practice. You'll learn how to create customized workflows for a variety of needs, from managing client meetings and call cadence routines to coordinating events and annual reviews. We'll explore how different templates for meetings, call cadences, and events can be scaled down or repurposed for other processes, making them highly adaptable. You'll also learn how to automate and trigger these workflows using Redtail Automations, ensuring tasks are launched at the right time with minimal manual effort. With Redtail Workflows, you can build repeatable, scalable systems that enhance client service and operational efficiency.

Providing Seamless and Organized Client Communication with Redtail Speak & Redtail Imaging

In today's fast-paced financial landscape, staying ahead requires unwavering commitment to efficiency and client satisfaction. This session will help you understand how Redtail Speak and Redtail Imaging empower financial professionals to maintain seamless communication and organized documentation. Discover how Redtail Speak facilitates compliant, real-time text messaging, enhancing client interactions and team collaboration. Explore Redtail Imaging's capabilities in providing secure, CRM-integrated document management that ensures easy access and organization of vital information. Gain insights into best practices to optimize these tools, ensuring your firm remains agile, responsive, and client-focused.

Unlock the Full Potential of the Advisor Portal

Explore the Advisor Portal's comprehensive suite of tools designed to streamline practice management and enhance client engagement. Gain an understanding of general navigation within the platform, including how to access core features. Learn how to submit service requests, use the Forms Library, generate proposals, open new accounts, and customize client reporting. Leverage built-in workflows and secure communication channels to simplify daily operations and deliver a seamless client experience.

Meeting-Ready in Minutes: Prepping for Client Conversations in Orion Connect

Short on time but want to walk into your client meeting fully prepared? In this fast-paced session, we'll show you how to use Orion Connect to quickly pull the right data, reports, and insights to make your meetings smoother and more impactful. From key dashboards to pre-built reports, you'll leave with a go-to prep routine that saves time and boosts confidence.

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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.

Register Today

3399-U-25343

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Redtail Advisors

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PRE-CONFERENCE EXCLUSIVE

From Whiteboard to Workflow: Effective Process Management with Redtail Workflows

In this session, Redtail Training Experts will guide you through the process of whiteboarding and implementing Workflows in Redtail CRM with intention and strategy in mind. You'll discover how to leverage whiteboarding techniques to visually map and refine your Workflow strategy before building it within Redtail. We'll explain how to set a clear Target Date and calculate each Step's due date, so your processes stay on schedule. You'll explore the use of Outcomes to create conditional paths in your Workflow—streamlining the process and allowing for more flexibility. This pre-conference session will help you push past process-building pitfalls to create systems that drive action and create accountability. Throughout the session, we'll walk through identifying critical touchpoints in the client journey and show how to configure those within Redtail Workflows to stay organized and boost operational efficiency.

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Redtail Community Group

Redtail has always been more than a CRM — it's a hub for connection, collaboration, and community. Join fellow Redtail users for a live, interactive session where we'll dive into real-world workflows, favorite automations, and creative ways advisors are personalizing the client experience.

Led by the Redtail team and power users from across the country, this session is your chance to ask questions, share what's working, and discover new ways to get more from your Redtail tech stack. From integration tips to time-saving tricks, we're putting the you in CRM.

Because when your technology works the way you work, everything gets easier.

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Reporting/Advanced Search: Driving Insights using Redtail's Advanced Search and Reports

In this session, we will explore powerful strategies to elevate your firm's data-driven decision making by leveraging the capabilities of Redtail's Advanced Search and Reporting tools. You will learn how to construct targeted Advanced Searches and apply Report Filters to uncover meaningful patterns, track client engagement, identify business opportunities, and improve operational efficiency. We will also focus on making this repeatable using QuickLists and Saving Report Filters. This session will include real-world examples and use cases to help you turn data into decisions with confidence.

Proactive Contact Engagement

Effective contact engagement means more than frequent outreach—it's about meaningful, well-timed touchpoints that build trust and drive results. In this session, you'll learn how to use Redtail CRM features together such as Redtail's Advanced Search to build precise contact lists, Redtail Speak for personalized texting, and Opportunities to track your sales pipeline efficiently. You'll walk away with practical strategies to create lasting connections and a CRM that works as hard as you do.

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