



ASCENT 2026 AGENDA

Trading Leaders

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.

The Custom Revolution: How Direct Indexing is Rewriting the Rules of Investing

Direct indexing is rapidly evolving from a niche offering to a core portfolio strategy, empowering advisors to deliver hyper-personalized tax, ESG, and factor exposures at scale. This session explores how the next wave of custom indexing is driving client engagement, deepening relationships, and enhancing firm-level value. Learn from experienced professionals who are using this approach to differentiate their practice—and hear where the technology and implementation challenges are headed next. Whether you're just getting started or refining an existing strategy, this session will help you see what's possible.

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

Calling all traders, rebalancers, and portfolio operations pros — Trade Talk is your dedicated space to go deep on trading strategy, process optimization, and real-world application of your trading tools.

Join peers from across firms to share best practices, talk shop on block trades, model management, overlay strategies, cash management, and more. Whether you're navigating complex client preferences or refining your daily workflows, this group gives you access to the sharpest minds in the trade ops game.

Bring your questions, your insights, and your battle-tested ideas. This session is all about community-powered problem-solving — no compliance disclaimers required.

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.

Tech Demo: Model Matchmaking Made Easy

Explore the Orion Investment Portal to discover, compare, and blend third-party and in-house strategies with full control and transparent data. Whether you're outsourcing, building your own blends, or exploring new strategit options, this marketplace simplifies everything. Use side-by-side comparisons and filters to evaluate risk, performance, and strategy fit in minutes. If managing models has ever felt complicated, this session will make it easier than ever.



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.

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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Wealth management services provided by Orion Portfolio Solutions, LLC ("OPS"), a registered investment advisor. Orion OCIO services provided by TownSquare Capital, LLC ("TSC"), a registered investment advisor. OPS and TSC are affiliates and wholly owned subsidiaries of Orion Advisor Solutions, Inc.

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