Orion | ASCENT

ASCENT 2026 AGENDA

Wealth Advisors and Planners - OCIO Advisor

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

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Orion Advisor Academy Live: Elevate Your Practice & Earn CE Credit

Kick off your Ascent experience by joining us for Orion Advisor Academy Live, an immersive, in-person learning event designed for financial professionals who want to level up their expertise and bring immediate value back to their firms. This workshop is packed with actionable insights, practical training, and peer networking—plus, you'll earn valuable Continuing Education (CE) credit for your participation.

Led by Orion's industry experts, this course covers essential topics including best practices for leveraging Orion technology, real-world case studies, and strategies to maximize efficiency, client service, and compliance. Expect a mix of hands-on demos, interactive exercises, and facilitated discussions that will empower you to apply new skills right away.

What you'll gain:

- In-depth training on Orion's most powerful tools and workflows
- Step-by-step guidance for solving common practice management challenges
- Ideas and tactics to improve client engagement and operational effectiveness
- CE credit to support your ongoing professional development
- Opportunities to collaborate and learn alongside peers and Orion experts

Whether you're a new user or a seasoned pro, you'll walk away from this workshop with fresh strategies and confidence to make the most of your Orion investment.

Space is limited—register early to secure your spot!

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.

Navigating Complexity: A High Net Worth Asset Manager Panel

Strategies, Trends, and Tactics for Serving Sophisticated Investors

Join a powerhouse panel of asset managers who specialize in high-net-worth (HNW) strategies delivered through Orion's platform. In this candid conversation, you'll hear how top asset managers are navigating today's market environment while building custom solutions that meet the complex needs of affluent clients.

From tax-sensitive investing to alternative allocations, legacy planning to risk management—this session will unpack the evolving expectations of HNW households and the innovative strategies designed to serve them. You'll walk away with fresh insights into how to better partner with investment managers and tailor portfolios that go beyond basic diversification.

Whether you're already serving HNW clients or looking to grow in that space, this panel is your front-row seat to the future of elevated asset management.

Portfolio Perspectives

Get inside the minds of Orion's portfolio managers and your fellow advisors in this interactive, advisor-focused session designed to explore what's moving markets — and what that means for client portfolios.

In Portfolio Perspectives, wealth advisors will engage in a candid, real-time discussion with Orion's investment team, exchanging views on portfolio construction, asset allocation, tax management, and how to position client accounts for long-term success in today's volatile environment.

Come ready to talk markets, share strategies, and sharpen your perspective alongside peers who are in the trenches with you every day. Let's turn market noise into meaningful dialogue.

Unlocking Scale and Personalization with Tailored Allocation Portfolios

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.

Advanced Tax Planning & Estate Strategies

For high-net-worth and ultra-high-net-worth clients, standard tax and estate planning simply isn't enough. This session explores advanced strategies designed to maximize tax efficiency, preserve generational wealth, and deliver real value at every stage of a client's financial journey.

Join us for an in-depth discussion on forward-thinking planning techniques—ranging from grantor trusts and tax-efficient gifting strategies to advanced entity structures and charitable planning vehicles. Whether you're navigating shifting tax laws or preparing clients for large liquidity events, this session will equip you with actionable tools and insights to help clients plan smarter.

We'll also explore how leading firms are leveraging specialized software, data integrations, and service providers to streamline these complex workflows and deliver scalable, high-impact advice.

What you'll gain:

- Advanced tax mitigation strategies for high-income and HNW clients
- Estate planning structures for generational continuity
- Technology tools that bring clarity and scale to complex planning
- How to deepen client loyalty by solving their most intricate challenges

This session is ideal for firms looking to elevate their planning capabilities and stay ahead of evolving client expectations.

Townsquare Capital Advisor Roundtable: Ideas, Insights & Investment Innovation

Townsquare Capital advisors are invited to gather for a dedicated in-person session focused on connection, collaboration, and the pursuit of alpha.

Join fellow advisors, portfolio managers, and Orion team leaders for a candid roundtable on what's working, what's evolving, and what's next in the world of institutional-style portfolio management. This interactive session will explore advanced use cases, best practices for leveraging the OCIO partnership, and shared growth opportunities across the Townsquare community.

Expect meaningful conversation around:

- Driving client growth through model portfolio sophistication
- Differentiating with portfolio audits and investment consulting
- Implementation and scale: real-world tips for operational excellence
- Product feedback: what enhancements would make the partnership even more powerful?

Whether you're new to Townsquare or a longtime advocate of the OCIO model, this session offers a unique chance to connect with peers who share your approach—and ambition.

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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

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