Orion | ASCENT

ASCENT 2026 AGENDA

Wealth Advisors and Planners

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!

Don't Start with Planning, Start with the Person

Most planning conversations start with data. But what if you started with behavior instead — and built the plan around what matters most to your client? In this session, you'll learn how to use Orion's behavioral finance tools to go deeper from the first interaction: uncovering core values, identifying emotional roadblocks, and re-framing how clients define success.

When the Market Panics, Don't Let Your Clients Follow

Market swings are inevitable — but client overreactions don't have to be. This session equips you with communication frameworks, behavioral coaching strategies, and proactive planning techniques to help clients stay grounded during turbulent times. Learn how to crisis-proof your relationships so you're seen not just as a portfolio manager, but as a trusted voice of reason.

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.

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.

How to Talk to Clients about the Economy

Market headlines may change daily, but your clients' anxiety is a constant. And when economic uncertainty strikes—whether it's inflation, interest rate hikes, political gridlock, or global conflict—your ability to explain what's happening (and what it means for them) becomes even more important.

In this session, we'll explore a practical framework for discussing the economy with clients in a way that instills confidence, reinforces your value, and keeps them focused on their long-term goals.

How to Talk to Clients about their Portfolios and Your Investment Framework

Clients don't just want performance—they want to understand why you invest the way you do. A clear, confident investment framework is the foundation of trust, and how you communicate it can determine whether clients stay the course during market turbulence or bail at the worst possible time.

In this session, we'll walk through how to articulate your investment philosophy in a way that resonates with clients at every stage of wealth.

Winning the Liquidity Event: Planning Strategies for Founders and Entrepreneurs

No one forgets the moment they sell their company — but not every founder walks away with the peace of mind they expected. In this candid panel, entrepreneurs and business owners who've experienced significant liquidity events share what went right, what they would do differently, and how their financial advisors helped — or missed the mark. Learn directly from those who've been through the process, from pre-sale planning and emotional decision-making to the tax surprises and legacy conversations that came after the wire hit. This session will offer a rare, unfiltered look at the client's side of the deal.

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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