ORION ASCENT

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

Success in our industry isn't just about advisors — it's about the teams behind them who make it all possible. This year, we've curated content designed to support and empower client support and operations teams, who keep the wheels of the business turning. With a specialized agenda tailored just for you, Ascent 2025 is your chance to gain practical insights and refine your expertise.

PERSONA OVERVIEW

Wealth Management Staff

This agenda is for the client support and operations specialists who handle the nuts and bolts of advisor efficiency. As someone who directly impacts the client experience, you'll gain actionable knowledge on key topics such as how to plan client events, leverage Orion's tools, and streamline operations for smoother quarter-end processes (to name a few!).

LET'S DIVE IN

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.

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!

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 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.

It's All in the Details: How to Make Magic for Your Clients

Did you know that, according to Zippia, 72% of customers will recommend the brand/company to 6 or more people if they have a positive client experience?* Client Experience isn't just one thing, it's a bunch of little things. Walt Disney himself once said, "There is no magic in magic, it's all in the details." Join us as we show you all about how you can make a magical experience for your clients by focusing on the little details of their lives. Come join us to learn about ways to elevate your client experience beyond the service you provide to them, to make sure that they feel emotional, resonant connections.

*Source: 25 Must-Know Customer Experience Statistics, Zippia, 2023.

The Mind and the Machine

"The most important thing in communication is hearing what isn't said." – Peter Drucker.

In today's rapidly evolving financial landscape, where technology and emotional intelligence converge, mastering the art of connection has never been more crucial! Join us in this session as we dive into the transformative power of Artificial Intelligence (AI) and discover how it can revolutionize the way you engage with your clients. Utilizing insights from the BeFi 20 tool, you'll learn how to decode investor persona results and craft personalized communication strategies that resonate deeply with your clients' unique mindsets.

Together, we'll explore innovative AI-driven solutions that will empower you to create meaningful conversations and forge lasting relationships. By the end of this session, you'll walk away with practical tools and fresh ideas to enhance trust, boost engagement, and inspire loyalty with every client interaction. Get ready to embrace the future of finance and unlock the potential of your client relationships — one conversation at a time!

Source: Drucker, P. F. (1992). The New Realities: In Government and Politics, in Economics and Business, in Society and Worldview. HarperCollins.

How to Plan an Epic Client Event

According to Harvard Business Review, businesses saw over 30%* revenue growth in the past two years also significantly increased their event activity. Hosting unforgettable client events can foster a sense of community and strengthen relationships with your clients and prospects. This session will explore innovative strategies for planning and executing events that leave a lasting impression. Discover how to create engaging, memorable experiences that not only enhance client loyalty but also drive business growth.

*Source: The Event Marketing Evolution, Harvard Business Review, 2018.

Turn Your Team into an Unstoppable Machine

As an office, you could have the right tools in place, the right plans, and the right attitude, but if your team is not on the same page, your plans could wind up less than the sum of its parts. In fact, according to Dale Carnegie, organizations with engaged employees outperform those with low employee engagement by 20%*. In this session, get key tips, tricks, and strategies to keep your team functioning for high performance to truly make your practice unstoppable. Remember, as the old saying goes, "Teamwork makes the dream work."

*Source: The ROI of Employee Engagement: 7 Stats Your Need to Know, Business2Community, 2022.

Beyond Quarter-End: The Client Communications Plan Every Advisor Needs

According to YCharts, client comfort with their financial plan skyrockets from 22% to 71% when we communicate with clients on a monthly basis, versus every 4-6 months or less.* So... what's your communication plan? Clients want to be interacted with, and your firm should have a consistent plan in place — including calendars, content, e-mail, texting, and more. Discover the key elements of a successful communication plan that can elevate your client relationships and drive better outcomes, as well as uncover the most valuable parts of your client communications plan that you might be missing.

*Source: Why Frequent Advisor Communication Matters, Y-Charts, 2024.

Maximizing Your Advisor Portal

Are you using your Advisor Portal to its full potential? Find out if you're fully leveraging the platform's newest and most robust features that elevate your experience and help you grow at scale.

Join us to learn about:

- Top 5 best practices for day-to-day efficiencies
- Powerful integrations with Redtail CRM, Orion Risk Intelligence, and more
- Time-saving features and functionality for new account opening, investment research and comparison, automated notifications, and the highly-anticipated Orion Compare experience.

GET GUIDANCE

Personalized Consultations

Take advantage of our consultation appointments to receive personalized guidance. Meet one-on-one with Orion subject matter authorities to get tailored advice and insights that address your unique challenges and opportunities.

Ascent 2025 is designed to give you the tools, strategies, and confidence to take your operational and client support skills to the next level. Don't miss your opportunity to learn, connect, and elevate your role!

Register Today

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.

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

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