



## Orion Edition – Day One

7:00 AM – 8:00 AM	Check In / Continental Breakfast
8:00 AM – 8:15 AM	Welcome
8:15 AM – 8:30 AM	Break / Classrooms Split
8:30 AM – 10:00 AM	<p><b>Deep Dive Workshop – Once Upon a Portfolio: Crafting Your Trading Tale</b></p> <p>Every portfolio tells a story, and trading is the act of writing its most dynamic chapters. This workshop dives deep into the art of narrative portfolio construction through strategic trading practices. Join us to learn how to craft portfolios that resonate with each client's journey.</p> <p><u>Key Takeaways:</u></p> <ul style="list-style-type: none"><li>○ Managing Cash Needs</li><li>○ Advisor Trading</li><li>○ Portfolio Compare</li></ul>
10:00 AM – 10:10 AM	<b>Break</b>
10:10 AM – 11:40 AM	<p><b>Deep Dive Workshop – The Client Portal Playbook: Help Your Client Tell Their Story</b></p> <p>Empower your clients to actively participate in their financial story with Orion's Client Portal. This session dives into the tools and strategies you need to help clients visualize their goals, track their progress, and stay engaged in shaping their financial future.</p> <p><u>Key Takeaways:</u></p> <ul style="list-style-type: none"><li>○ Orion Client Portal</li><li>○ BeFi20</li><li>○ Orion Planning</li></ul>



11:45 AM – 12:30 PM

**Expert Panel – Building Happily Ever After: Transforming Experiences Through Strategy and Tech**

Discover how to create “Happily Ever After” moments for your clients by building a strategic tech stack that helps you save time and lessen pain points. You won't want to miss this panel as we bring together industry experts and integration partners to explore practical ways to identify pain points, streamline operations, and deliver unforgettable client experiences. Learn how to turn your clients’ journeys into success stories they’ll be telling for years to come.

12:30 PM – 1:15 PM

**Lunch**

1:15 PM – 2:45 PM

**Deep Dive Workshop – The Billing Quest: Charting a Course to Revenue Success**

Much like Captain Ahab's relentless pursuit of Moby Dick, achieving consistent revenue requires a strategic and determined approach to billing. This workshop dives deep into our newly revamped Billing App, equipping you with the navigational tools needed to chart a clear course toward revenue success. We'll explore everything from setting up precise billing parameters to mastering best practices that will keep your financial ship sailing smoothly.

Key Takeaways:

- Billing App
- Bill Settings and Setup
- Billing Best Practices

2:45 PM – 3:00 PM

**Break**



3:00 PM – 4:40 PM

**Deep Dive Workshop – Building Reports Worthy of an Odyssey**

In Homer's The Odyssey, Odysseus faced epic challenges to navigate his way home, relying on clever strategies and resourceful tools. As a financial advisor, you face your own odyssey: translating complex financial data into reports that guide your clients toward their goals. Orion Reporting is your steadfast ally, equipping you with innovative features and best practices to chart a clear path forward. Join us to ensure your reports are as legendary as Odysseus's journey!

Key Takeaways:

- New Report Templates
- Performance Reporting
- Customization



## Orion Edition – Day Two

7:00 AM – 8:00 AM      Check In / Continental Breakfast

8:00 AM – 8:10 AM      Welcome

8:10 AM – 8:15 AM      Break / Classrooms Split

8:15 AM – 9:15 AM      **Navigating the Chapters of Orion Connect**

Every great story is built on understanding its structure, and Orion Connect is no different. This session will guide you through Orion Connect's key features and tools, helping you confidently move from one chapter to the next.

Key Takeaways:

- Dashboard
- Portfolio View
- Portfolio Audit

9:15 AM – 10:15 AM

**The Haunting of Data: Keeping Orion's Secrets Organized**

Just as Sherlock Holmes meticulously pieces together clues to solve a mystery, preparing for a client meeting requires carefully assembling and verifying investment reports to ensure they are clean, accurate, and insightful. In this session, we'll explore how to troubleshoot common challenges, analyze data critically, and present information clearly to your clients, ensuring you solve any reporting issues before they arise and present a report that is both compelling and reliable.

Key Takeaways:

- Data Best Practices
- Database Setup
- New Accounts



10:15 AM – 10:30 AM

**Break**

10:30 AM – 11:30 AM

**The Adventures of Sherlock Holmes: Solving the Case of Accurate Reports**

Just as Sherlock Holmes meticulously pieces together clues to solve a mystery, preparing for a client meeting requires carefully assembling and verifying investment reports to ensure they are clean, accurate, and insightful. In this session, we'll explore how to troubleshoot common challenges, analyze data critically, and present information clearly to your clients, ensuring you solve any reporting issues before they arise and present a report that is both compelling and reliable.

Key Takeaways:

- Data Queries
- Reports
- Performance

11:30 AM – 12:30 PM

**Lunch**

12:30 PM – 1:45 PM

**Shhh... this is a Library: Quieting the Noise of Billing**

In the library of financial management, the last thing you need is the clatter of complex billing processes. Orion's Billing app helps you shush the chaos, letting you focus on the discovery and delivery of value to your clients. Quiet the noise, streamline your billing, and make room for what matters most—sharing financial knowledge.

Key Takeaways:

- Billing App
- Bill Settings
- Quarter End Dashboard



1:45 PM – 3:00 PM

## **Your Client's Wishes, Granted: The Magic of Orion's Client Portal**

Like a fairy godmother granting wishes, Orion helps you effortlessly connect, understand, and deliver exactly what your clients need—making every interaction feel like magic.

### Key Takeaways:

- Client Portal
- Orion Planning

*Orion Behavioral Finance ("Orion BeFi") is the branding name of various tools and services related to behavioral finance offered by Orion Advisor Solutions, Inc. and its subsidiaries. Orion BeFi tools are crafted to help investors and their financial advisors integrate behavioral psychology research into their investment decisions. Orion BeFi tools and services do not provide investment advice.*

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