Orion

Orion Strategic Partnership and Event Sponsorships

2027 Prospectus

Orion Strategic Partnerships and Event Sponsorships

SPONSORSHIP OPPORTUNITIES

sponsorships@orion.com

OUR MISSION

We are building a wealth-tech community where every advisor and investor thrives.

OUR CULTURE

STRATEGIC PILLARS

- Pioneering Technology
- Reliable Systems and Support
- Comprehensive Wealth Solutions
- Flexible Ecosystem
- Growth Resources

OUR VALUES

Create Raving Fans • Innovate Always
See It Through • Support One Another

2389-OPS-9/17/2024

Orion's Scale

8.6M Technology Accounts

18 out of **20**

Today, 18 out of the Top 20 *Barron's* RIA Firms rely on Orion's technology[1]

$211B

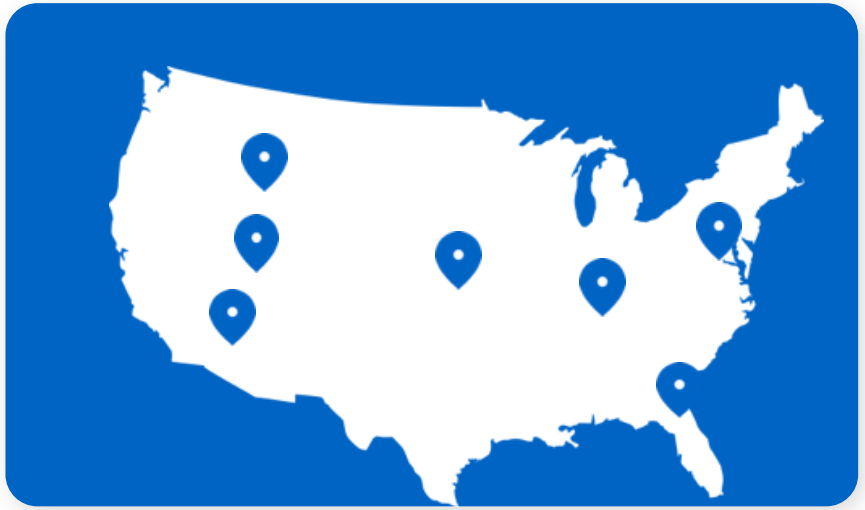
Wealth Management Assets

100,000+

Redtail Users

$6.6T

Platform Assets



We are building a wealth-tech community where every advisor and investor thrives.

As of 9/28/26

[1]Barron's 2026 Top 100 RIA firms. Wealth Management Assets include assets managed on a discretionary and non-discretionary basis by Orion Portfolio Solutions, LLC ("OPS") and TownSquare Capital, LLC ("TSC") on their proprietary platforms; assets in proprietary and third-party models made available through the Orion Investment Portal; assets in OPS proprietary models managed on third-party platforms; and assets associated with outsourced services provided by OPS or TSC such as trading, billing, or back-office administration.

3098-R-25315

Orion Strategic Partnerships

Strategic Partnerships

Build Influence. Deepen Engagement. Drive Growth.

The Orion Strategic Partnerships Program helps organizations build meaningful, year-round relationships with Orion's advisor community and leadership teams. Through a mix of events, digital content, and strategic marketing initiatives, partners gain opportunities to elevate their brand, engage directly with financial advisors, and drive deeper business growth across the Orion ecosystem.

For 2027, Orion will offer Strategic Partnerships across three tiers:

- **Premier Partner**
- **Platinum Partner**
- **Elite Partner**

These flexible levels ensure the right fit for your goals, budget, and brand ambition.

2027 Premier Partner

$250,000

Annually (4 available)

2027 Orion Ascent Conference

EXHIBIT

- 20x20 booth space
- Opportunity to purchase additional 10x10 units for additional fees
- First selection of exhibitor booth placement
- Kiosk in Tech Village (tech integration partners only)
- Four lead scanning licenses for booth

ATTEND

- 10 conference registrations (includes speakers)
- Opportunity to purchase unlimited additional full-conference or day-pass registrations at published rate
- Invitation to attend sponsor receptions
- Two passes to Elite Advisor event and access to all Elite advisor spaces
- Opportunity to be part of a 30-minute Ascent pre-conference meeting with Orion sales team members

SPEAK

- **Main Stage:**
  - 15-minute main stage fireside chat*
- **Choice of Panel or Breakout Session**
  - **Panel:** Opportunity to nominate 1 panelist for a 40-minute educational session*
  - **Breakout Session:** Nominate a presenter for a 40-minute CE or advisor-led session*
- **Community Group Roundtable:** 40-minute moderated session included in Community Group Access*

PROMOTE:

- Choice of one promotional item (first-come, first-serve): Mobile App Home Screen, Conference WiFi, Registration Check-In Screen, Mobile App Gamification
- Premier logo placement in select conference print, electronic and on-site branding
- One targeted pre-con email sent to three community groups on your behalf
- Mobile app banner advertisement
- ”Blurb” in Orion client newsletter
- Pre-event and post-event conference opt-in attendee list, including email addresses
- Opportunity to provide promo item/gift in Elite Advisor Lounge

EXTRAS

- 10% discount on any Events, Content, or Connect Add-ons
- Complimentary concierge coordination of a dine-around (sponsor pays for meal)
- On-site Ascent concierge

2027 Events

- Sponsorship of one exclusive event and two standard events. Choices include:

  Exclusive Events

  - 2027 Wealth Management Elite
  - 2027 CEO Summit
  - 2027 Advisory Council In-Person Meetings

  Standard Events

  - 2027 Wealth Management Territory Events
  - 2027 Align/Redtail/Eclipse University
  - 2027 OCIO Bootcamp

Marketing Placements

- Two targeted emails
- Two dedicated webinars
- One social media share/quarter
- Quarterly featured content downloads housed in Orion’s Online Resource Center and promoted in client newsletter with link + leads list and quarterly engagement reports
- Featured guest opportunity in our ongoing value-add content (webinars, podcasts, videos, etc.)*
- Bi-monthly guest blog in Orion Resource Center
- Creation of two SalesLoft templates on partner to be distributed by Orion sales team
- Dedicated partner page

Community Groups

- Pre-Ascent introduction in virtual community group meeting
- Serve as a co-facilitator for one virtual community group session with your choice of the Community Group
- Complimentary concierge coordination of a dine-around (sponsor pays for meal)
- On-site Ascent concierge

Orion Advisor Academy

- Featured provider of 1 CE course/quarter (available for 3 years)
- Opportunity to “own” a specific topic tied to your brand/strategy/expertise
- Monthly list of opt-in enrollees in courses
- Logo placement in select branding
- Resource center listing

Wealth Management Data Package

- OPS & Brinker proposals including the advisor name, email, phone, city, state, and zip. Other details shared are BD name, proposal amount, % allocations, and model name
- OPS & Brinker enhanced AUM & Flows reporting
- Access to monthly What’s Hot” data with flow analysis including flows percentages and top 10 models ranked by 3mo, YTD, and 1 year. Data is categorized by benchmark, mandate, firm size, model type, and asset class
- Reports available in your portal

Orion Team Access

- 30-minute 1:1 with Orion CEO
- 30-minute 1:1 with one additional Orion executive or board member
- 30-minute ”pitch” opportunity with either the head of investments or head of tech product
- Opportunity to attend one in-person Wealth Management or Technology sales meetings
- Opportunity to present at two of either the virtual Wealth Management or Technology weekly sales meetings
- One strategy meeting with Orion exec team pre-Ascent
- Advanced insight into Orion roadmap

Partner Support:

- Dedicated Marketing Manager
- Monthly marketing planning meetings
- Quarterly marketing engagement reports
- Monthly status report of all ongoing efforts/initiatives

**Topic, speaker, title and description to be agreed upon with Orion*

2027 Platinum Partner

$175,000

Annually (6 available)

2027 Orion Ascent Conference

EXHIBIT

- 10x20 booth space
- Opportunity to purchase additional 10x10 units for additional fees
- Second selection of exhibitor booth placement
- Two lead scanning licenses for booth

ATTEND

- 6 conference registrations (includes speakers)
- Opportunity to purchase unlimited additional full-conference or day-pass registrations at published rate
- Invitation to attend sponsor receptions
- One pass to Elite Advisor event and access to all Elite advisor spaces

SPEAK

- **Panel:** Opportunity to nominate 1 panelist for a 40-minute educational session*
- **Breakout Session**: Opportunity to nominate a presenter for a 40-minute CE or Advisor-led session*
- **Community Group Roundtable:** 40-minute moderated session included in Community Group Access*

PROMOTE:

- Premier logo placement in select conference print, electronic and on-site branding
- One targeted pre-con email sent to three community groups on your behalf

PROMOTE (continued):

- Mobile app banner advertisement
- ”Blurb” in Orion client newsletter
- Pre-event and post-event conference opt-in attendee list, including email addresses
- Opportunity to provide promo item/gift in Elite Advisor Lounge

EXTRAS

- 10% discount on any Events, Content, or Connect Add-ons
- Complimentary concierge coordination of a dine-around (sponsor pays for meal)
- On-site Ascent concierge

2026 Events

- Sponsorship of one exclusive event and one standard event. Choices include:

Exclusive Events

- 2027 Wealth Management Elite
- 2027 CEO Summit
- 2027 Advisory Council In-Person Meetings

Standard Events

- 2027 Wealth Management Territory Events
- 2027 Align/Redtail/Eclipse University
- 2027 OCIO Bootcamp

Marketing Placements

- One targeted email
- One dedicated webinar
- Two social media shares
- Two featured content downloads housed in Orion's Online Resource Center and promoted in client newsletter
- Quarterly guest blog authored by sponsor and posted in Orion’s online resource center
- Dedicated partner page on orion.com
- Creation of one Sales Loft template on partner to be distributed by Orion sales team

Community Groups

- Pre-Ascent introduction in virtual community group meeting
- Serve as a co-facilitator for one virtual community group session with your choice of the Community Group

Orion Advisor Academy

- Featured provider of 2 CE courses (available for 3 years)
- Monthly list of opt-in enrollees in courses
- Logo placement in select branding
- Resource center listing

Wealth Management Data Package

- OPS & Brinker proposals including the advisor name, email, phone, city, state, and zip. Other details shared are BD name, proposal amount, % allocations, and model name
- Access to monthly “What’s Hot” data with flow analysis including flows percentages and top 10 models ranked by 3mo, YTD, and 1 year. Data is categorized by benchmark, mandate, firm size, model type, and asset class
- Reports available in your portal

Orion Team Access

- 30-minute 1:1 with one additional Orion executive or board member
- Opportunity to present at one of either the virtual Wealth Management or Technology weekly sales meetings
- Targeted internal sales email + Teams post to Orion sales team

Partner Support:

- Dedicated Marketing Manager
- Quarterly marketing planning meetings
- Quarterly marketing engagement reports
- Monthly status report of all ongoing efforts/initiatives

**Topic, speaker, title and description to be agreed upon with Orion*

2027 Elite Partner – NEW!

$125,000
Annually (8 available)

2027 Orion Ascent Conference

EXHIBIT

- 10x10 booth space
- Opportunity to purchase additional 10x10 units for additional fees
- One lead scanning license for booth

ATTEND

- 4 conference registrations (includes speakers)
- Opportunity to purchase up to 6 additional full-conference or day-pass registrations at published rate
- Invitation to attend sponsor receptions

SPEAK

- **Panel:** Opportunity to nominate 1 panelist for a 40-minute educational session*

PROMOTE:

- Priority logo placement in select conference print, electronic and on-site branding
- Mobile app banner advertisement
- Pre-event and post-event conference opt-in attendee list, including email addresses

EXTRAS

- 10% discount on any Events, Content, or Connect Add-ons
- Complimentary concierge coordination of a dine-around (sponsor pays for meal)
- On-site Ascent concierge

2026 Events

- Sponsorship of 3 standard events. Choices include:

  Standard Events

  - 2027 Wealth Management Territory Events
  - 2027 Align/Redtail/Eclipse University
  - 2027 OCIO Bootcamp

Marketing Placements

- One targeted email
- One dedicated webinar
- Dedicated partner page on orion.com
- Creation of one Sales Loft template on partner to be distributed by Orion sales team

Wealth Management Data Package

- OPS & Brinker proposals including the advisor name, email, phone, city, state, and zip. Other details shared are BD name, proposal amount, % allocations, and model name
- Access to monthly “What’s Hot” data with flow analysis including flows percentages and top 10 models ranked by 3mo, YTD, and 1 year. Data is categorized by benchmark, mandate, firm size, model type, and asset class
- Reports available in your portal

Orion Team Access

- Opportunity to present at one of either the virtual Wealth Management or Technology weekly sales meetings
- Targeted internal sales email + Teams post to Orion sales team

Partner Support

- Dedicated Marketing Manager
- Quarterly marketing planning meetings
- Quarterly marketing engagement reports
- Monthly status report of all ongoing efforts/initiatives

**Topic, speaker, title and description to be agreed upon with Orion.*

Strategic Partnerships Menu

AT ASCENT

	Premier $250K	Platinum $175K	Elite $125K
EXHIBIT & ATTEND			
Booth space	20x20	10x20	10x10
Booth selection priority	First	Second	–
Tech Village kiosk (integ. partners)	✓	–	–
Lead scanning licenses	4	2	1
Conference registrations	10	6	4
Add'l registrations	Unlimited	Unlimited	Up to 6
Sponsor reception	✓	✓	✓
Elite Advisor event passes	2	1	–
Elite Advisor spaces access	✓	✓	–
30-min Sales-team mtg	✓	–	–
SPEAK			
Main-stage fireside (15 min)	✓	–	–
Panel nomination (40 min)	✓	✓	✓
Breakout / CE session (40 min)	✓	✓	–
Community group roundtable (40 min)	✓	✓	–
PROMOTE			
Premium promo placement (choice)	✓	–	–
Logo in conference branding	✓	✓	✓
Mobile app banner ad	✓	✓	✓
Pre-con email to 3 community groups	✓	✓	–
Newsletter blurb	✓	✓	–
Opt-in attendee list (incl. emails)	✓	✓	✓
Promo gift in Elite Advisor Lounge	✓	✓	–
EXTRAS			
10% off Events / Content / Connect	✓	✓	✓
Dine-around concierge (sponsor pays)	✓	✓	✓
On-site Ascent concierge	✓	✓	✓

YEAR-ROUND PARTNERSHIP

	Premier $250K	Platinum $175K	Elite $125K
ORION EVENT SPONSORSHIPS			
Exclusive event sponsorships	1	1	–
Standard event sponsorships	2	1	3
CONTENT & MARKETING			
Targeted emails	2	1	1
Dedicated webinars	2	1	1
Social media shares	1/qtr	2	–
Featured content downloads	Quarterly	2	–
Featured guest in value-add content	✓	–	–
Guest blog in Resource Center	Bi-monthly	Quarterly	–
SalesLoft templates via Orion	2	1	1
Dedicated partner page	✓	✓	✓
Pre-Ascent virtual intro	✓	✓	–
Virtual community co-facilitator	✓	✓	–
ADVISOR ACADEMY			
Featured CE provider (3 yrs)	1/qtr	2 courses	–
Own a branded topic	✓	–	–
Monthly opt-in enrollee list	✓	✓	–
Logo + resource center listing	✓	✓	–
DATA & SUPPORT			
OPS & Brinker proposals data	✓	✓	✓
Enhanced AUM & flows reporting	✓	–	–
Monthly What's Hot analysis	✓	✓	✓
Reports in your portal	✓	✓	✓
Dedicated marketing manager	✓	✓	✓
Marketing planning cadence	Monthly	Quarterly	Quarterly
Engagement + status reports	✓	✓	✓
ORION TEAM ACCESS			
1:1 with Orion CEO (30 min)	✓	–	–
1:1 with exec / board member	✓	✓	–
Pitch to head of investments / product	✓	–	–
In-person sales meeting access	✓	–	–
Present at virtual sales meeting	2	1	1
Internal sales email + Teams post	–	✓	✓
Strategy mtg + roadmap insight	✓	–	–

Orion Event Sponsorships

Orion | ASCENT

2027 Ascent Overview

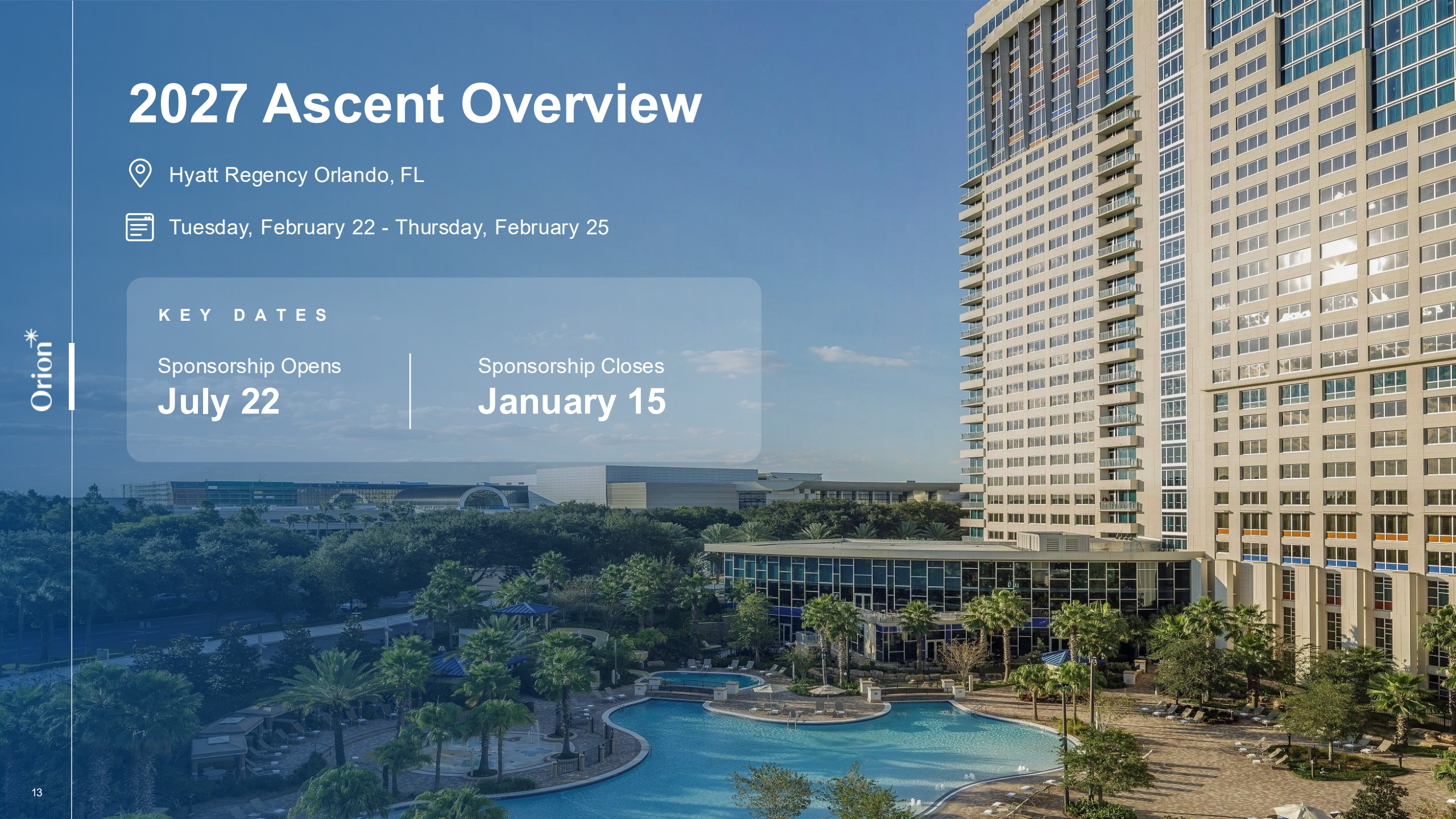
Hyatt Regency Orlando, FL

Tuesday, February 22 - Thursday, February 25

KEY DATES

Sponsorship Opens
July 22

Sponsorship Closes
January 15



Orion

Why Ascent

The industry's flagship stage

Ascent is Orion's annual flagship conference, purpose-built for RIAs, dually registered firms, broker-dealers, trust companies, and strategic partners. More than 820 firms joined in 2026 — from leading RIA custodians and top-tier asset managers to fintech innovators — for world-class keynotes, high-impact education, role-based community groups, and a buzzing exhibit hall with 100+ sponsors. Michael Kitces named it one of the best conferences for financial advisors.

Why advisors attend

To connect — with peers, partners, and purpose — sharing ideas, building community, and finding inspiration in how others personalize advice and scale their impact. And to learn — not only from Orion, but through direct access to you: the ecosystem of partners helping advisors operate more efficiently and serve clients more meaningfully.

Why your firm should be there

Ascent puts your brand in front of a powerful cross-section of the industry — from solo advisors to national-scale RIAs, banks, and trust companies, with firm sizes ranging from under $100M to $5B+ in AUM. These are growth-focused, technology-forward decision-makers looking to deepen client relationships and expand their impact — exactly the audience your firm wants to reach.

ASCENT 2027

Sponsorship Packages

Supernova- $90,000

EXHIBIT
- 10x20 booth space with opportunity to purchase additional 10x10 units for additional fees
- Kiosk in Tech Village (integration partners)*
- 2 lead scanning licenses

ATTEND
- 6 conference registrations
- Opportunity to purchase up to four additional conference registrations at published rate
- Invitation to attend sponsor receptions
- **NEW!** 2 passes to Elite Advisor Spaces

SPEAK
- **Breakout Session**
- Opportunity to nominate a presenter for a 40-minute CE or Advisor-led session**
- **Panelist** or **Roundtable**
  - **Panel:** Opportunity to nominate 1 panelist for a 40-minute educational session OR
  - **Roundtable:** Nominate 1 moderator for a community group roundtable session

PROMOTE
- Priority logo placement in select conference print, electronic and on-site branding
- Mobile app banner advertisement
- Pre-event and post-event conference opt-in attendee list, including email addresses

ACCESS
- 30-min 1:1 with a Senior Leader at Orion (SVP, EVP, or above) via Zoom prior to Ascent

SUPPORT
- Dine-around coordination concierge (sponsor pays for event)
- 10% discount on any Events, Content, or Connect add-ons

Solar- $65,000

EXHIBIT
- 10x10 booth space
- Opportunity to purchase additional 10x10 units for additional fees

ATTEND
- 4 conference registrations
- Opportunity to purchase up to four additional conference registrations at published rate

SPEAK
- **Panelist**
- Opportunity to nominate 1 panelist for a 40-minute educational session
- **Roundtable**
- Opportunity to nominate 1 moderator for a 40-min community group roundtable session

PROMOTE
- Logo placement in select conference print, electronic, and on-site branding
- Mobile app banner ad
- Pre-event and post-event conference opt-in attendee list, including email addresses

SUPPORT
- Dine-around coordination concierge (sponsor pays for event)

Lunar- $35,000

EXHIBIT
- 10x10 booth space

ATTEND
- 3 conference registrations
- Opportunity to purchase up to 4 additional conference registrations at published rate

PROMOTE
- Logo placement in select conference print, electronic, and on-site branding
- Pre-event and post-event conference opt-in attendee list, excluding email addresses

Stellar- $17,000

EXHIBIT
- Kiosk in Tech Village*

ATTEND
- 2 conference registrations
- Opportunity to purchase up to 4 additional conference registrations at published rate

PROMOTE
- Logo placement in select conference print, electronic, and on-site branding
- Pre-event and post-event conference opt-in attendee list, excluding email addresses

**Orion to assign kiosk location. **Topic, speaker, title and description to be agreed upon with Orion*

Additional Opportunities | Events, Content, and Connect

Exhibit Hall Demo

$10,000 (12 available)

Maximize visibility with a 20-minute presentation on a massive 8x20-foot LED screen during breakout blocks. You control the content and the message.

Sponsorship includes:

- One 20-minute LED screen presentation in the exhibit hall
- Session listed on the official Ascent agenda

Elite Event Sponsorship

$45,000 (1 available)

Kick off Ascent with exclusive access to Orion's top wealth advisors, tech firms, and executive leadership—high-impact visibility and VIP positioning.

Sponsorship includes:

- Opportunity to deliver welcome remarks and introduce Orion's CEO
- Three event passes for your firm's team
- Logo placement and signage at the event
- Recognition as a select sponsor of Orion's most exclusive pre-conference event

StreetCred PRessPlay Live Interview

$5,000 (3 available)

Position your firm as a thought leader with a professionally produced, branded interview filmed on-site at Ascent by StreetCred.

Sponsorship includes:

- Branded, professionally produced sit-down interview filmed on-site
- Content you'll use all year across your social and marketing channels
- Inclusion in the conference sizzle reel and ready-to-post social content

Breakout Session

$20,000 (4 available)

Amplify your voice beyond the booth by leading a 40-minute educational session on the official Ascent agenda.

Sponsorship includes:

- Opportunity to nominate a presenter for a 40-minute CE or advisor-led session
- Session listed on the official Ascent agenda

Community Group Round Table Moderator

$10,000

Lead the conversation that matters most to your audience. Facilitate a scheduled breakout discussion with a group of your choice—tech or wealth.

Sponsorship includes:

- Choice of community group (tech or wealth)
- Moderation of one scheduled breakout roundtable
- Facilitation prep and logistics provided by Orion

Women in Wealth Lounge & Luncheon

$30,000

Connect with the women shaping wealth management at Ascent through the Lounge and the Women in Wealth Luncheon with Orion's women leaders.

Sponsorship includes:

- Prominent branding and signage in the lounge and at the luncheon
- Introduce the leaders at the luncheon
- Recognition as sponsor of one of Ascent's most anticipated gatherings

Additional Opportunities | Promotions

Water Bottles: $15,000
(1 available)

Make a lasting impact by sponsoring the official water bottle at the conference. Your logo will be prominently displayed on every bottle ensuring repeated exposure throughout the event.

Hotel Key Cards: $15,000 (1 available)

Unlock unparalleled brand exposure by sponsoring the hotel key cards. With your logo prominently displayed on every card, your brand will be in the hands of every attendee.

Lanyards: $20,000
(1 available)

What better way to leave an impression than to see 2000+ participants wearing your firm's name/logo around their neck for the duration of the conference? Name badge lanyards are worn by each attendee to gain access to all conference events

Environmental Branding: Cost Varies

Integrate your brand into the very fabric of our event environment. Your branding will be prominently featured throughout the hotel, ensuring consistent visibility and engagement with all attendees, from the lobby to the event spaces. Inquire for opportunities and costs

Snack Break Sponsor: $30,000 (4 available)

Be the firm that gives attendees a reason to recharge and sponsor a dedicated snack break in or around the exhibit hall. We'll work with you on the specific snack items being offered, with your branding featured during the break.

Conference Tote Bags: $15,000 (1 available)

Attendees will associate your firm with the coffee and refreshments that keep them going throughout the event. Coffee, espresso drinks, and light snacks will be served from your branded bar in the exhibit hall throughout the day.

Orion

Exclusive Events

Orion CEO Summit

What is the Orion CEO Summit?

Launching in 2026, Orion's CEO Summit is an exclusive, invitation-only gathering of top enterprise CEOs shaping the future of wealthtech. Designed for a select group of 20–25 executives, the Summit brings together the most influential voices in the industry for two days of connection, insight, and inspiration alongside Orion's executive team.

Set in a private, premium location, the CEO Summit will offer a first look at Orion's long-term strategic vision, behind-the-scenes product innovation, and exclusive research on the forces driving transformation in wealth management. With thoughtfully curated experiences and ample space for candid discussion, peer connection, and strategic idea exchange, the CEO Summit is where the future of the industry takes shape—together.

Why do CEOs attend?

To gain clarity, connection, and competitive advantage. The CEO Summit offers a rare opportunity for enterprise leaders to step away from the day-to-day tasks and engage in high-level dialogue about where the industry is headed—and how to stay ahead.

CEOs attending the event get to know what's next from Orion, uncover emerging opportunities across wealthtech and financial services, and exchange ideas with peers navigating similar challenges at scale. It's time well spent with the people who shape the future—and understand the weight of leading it.

What types of firms join?

The CEO Summit is built for enterprise-level firms at the forefront of wealth management, fintech, and platform innovation. Participating firms span custodians, broker-dealers, aggregators, RIA consolidators, banks, trust companies, and tech-forward investment platforms—all unified by their scale, influence, and shared commitment to advancing the advisor-client experience.

Sponsorship Benefits

- 1 registration – C-level attendee
- Opportunity to nominate a panelist for an educational session
- Access to all content sessions and invitations to all meals, receptions and activities with attendees
- Branding at the event and email communications
- Opt-in pre and post conference attendee list
- Opportunity to provide gift items to attendees

Orion Wealth Management Elite Conference

What is the Wealth Management Elite Event?

The Wealth Management Elite Conference is Orion's premier in-person event exclusively for OPS and Brinker Capital wealth management clients. This intimate gathering brings together approximately 125 top advisors with Orion's leadership, sales, and training teams for three days of collaboration, strategy, and connection.

Advisors engage in curated consultation appointments, thought-provoking sessions with internal and external experts, and hands-on learning with Orion's investment and technology tools. The experience is enriched by networking opportunities that take full advantage of the destination's unique offerings—creating space for meaningful relationships to grow in a relaxed, inspiring setting.

Why do advisors attend?

To connect—with like-minded peers, Orion leadership, and leading asset managers in a more personal, relaxed setting. The conference creates space for authentic conversation, idea-sharing, and long-term relationship-building.

To learn—through expert-led sessions, practical workshops, roundtables, and 1:1 consults with Orion's sales and training teams. Advisors walk away with actionable insights on client engagement, portfolio construction, behavioral finance, emerging wealth, and more.

What types of firms join?

This invitation-only event is designed for Orion's most engaged wealth management clients—spanning a mix of registered reps and independent RIAs. These firms are growth-minded, client-focused, and committed to delivering elevated advice with the support of Orion's investment platform and services.

Sponsorship Benefits

- 2 registrations
- Opportunity to nominate a panelist for an educational session
- Opportunity to moderate a round table session.
- Access to all content sessions and invitations to all meals and receptions with attendees
- Branding at the event and email communications
- Opt-in pre and post conference attendee list

Orion Wealth Management Advisory Council

What is Advisory Council?

Orion's Advisory Council is a select group of top-tier clients from our TAMP platforms—Orion Portfolio Solutions and Brinker Capital—who collectively manage over $3 billion in assets on our platforms. This trusted group acts as a strategic sounding board, providing early input, candid feedback, and collaborative problem-solving to help Orion improve continuously.

Council members meet twice in person and twice virtually each year, engaging directly with Orion's executives and senior leaders. They receive early access to key initiatives, help shape the product roadmap, and influence strategic priorities that impact the broader advisor community.

Why do advisors join?

To have a voice—and to build community. Council members value the opportunity to shape Orion's roadmap, provide input on emerging ideas, and collaborate directly with Orion's senior leadership. Just as importantly, they form a tightly knit network of like-minded peers—advisors who are passionate about growth, innovation, and raising the bar across the profession.

Council participation is a year-long commitment, and many members choose to stay on for multiple years, deepening their relationships and continuing to help guide Orion's evolution.

What types of firms attend?

The Advisory Council is made up of the principals and owners—presidents, CEOs, and managing partners—of advisory practices that run their business on Orion's wealth platforms, Orion Portfolio Solutions and Brinker Capital. Members span the broker-dealer and RIA channels, from emerging, next-generation practices to established firms managing hundreds of millions—and in some cases over a billion—in client assets. What unites them is a growth mindset: hands-on owner-operators, early adopters of technology, and deeply engaged in the advice they deliver to clients.

Sponsorship Benefits

- Exclusive 30-minute session with Advisory Council members to introduce your firm, share insights, and receive direct feedback
- Sole sponsorship of the final night dinner, with recognition during the event
- Logo placement and sponsor recognition on the official agenda
- Invitation to all meals and networking events throughout the in-person meeting
- Opportunity to provide branded swag to all Advisory Council members
- Optional room drop opportunity (sponsor covers room drop fee)

Orion Tech Advisory Council

About the Tech Advisory Council

The Tech Advisory Council brings together a select group of partners and industry leaders for thoughtful conversation, strategic insight, and connection.

Throughout the event, attendees will have the opportunity to engage in discussions around business priorities, industry opportunities, and the evolving needs of advisors and clients.

Why Attend?

Shape the Future. Your perspective drives progress. Through open dialogue and real feedback, you help influence the direction of Orion's strategy, solutions, and advisor experience—ensuring we continue to evolve in ways that matter most to you and your clients.

Advise and Influence. Engage directly with Orion's leadership to share insights, challenge thinking, and provide meaningful input. Your voice plays a critical role in refining our tools, enhancing our services, and shaping the future of Orion.

Turn Insight into Impact. Your feedback doesn't sit on a shelf—it drives action. Walk away knowing your ideas contribute to real change, helping Orion build smarter solutions, stronger partnerships, and better outcomes for advisors and investors alike.

What types of firms attend?

The Tech Advisory Council is made up of the technology and operations leaders—CTOs, CIOs, COOs, and heads of platform—at some of the largest, most sophisticated RIAs on Orion's technology. These are national, growth-minded firms, many scaling through acquisition and managing billions in assets, that rely on Orion as the technology backbone of their business.

Sponsorship Benefits

- Exclusive 30-minute session with Advisory Council members to introduce your firm, share insights, and receive direct feedback
- Sole sponsorship of the final night dinner, with recognition during the event
- Logo placement and sponsor recognition on the official agenda
- Invitation to all meals and networking events throughout the in-person meeting
- Opportunity to provide branded swag to all Advisory Council members
- Optional room drop opportunity (sponsor covers room drop fee)

Standard Events

Orion OCIO Bootcamp

What is OCIO Bootcamp?

OCIO Bootcamp is a focused, one-day event designed exclusively for advisors utilizing Orion's OCIO services. Built to deliver meaningful connections and practical investment insights, the event brings together a select group of advisors and Orion's leadership for a fast-paced agenda packed with market updates, portfolio strategies, and hands-on application of tools and technology. From morning through evening, the Bootcamp offers the perfect blend of education and networking.

Why do advisors attend?

Advisors come to OCIO Bootcamp to engage with experts, learn about portfolio positioning, explore OCIO-supported investment tools, and walk away with practical ideas to elevate their practice. It's also a rare chance to connect with like-minded peers in a smaller, more collaborative setting.

What types of firms join?

OCIO Bootcamp draws primarily independent RIAs leveraging Orion's outsourced investment solutions. These firms are growth-minded, advice-forward, and eager to gain insights they can immediately apply to client portfolios and proposals.

Sponsorship Benefits

- Opportunity to participate in an educational panel
- Sponsorship of the evening dinner, with verbal recognition during the event
- Logo placement and sponsor recognition on the official agenda
- Invitation to all meals throughout the in-person meeting
- Opportunity to provide branded swag to all attendees
- Opt-in attendee list, including email addresses

Orion Wealth Management Due Diligence Events

Advisors Experience Orion First-Hand

Our Wealth Management Due Diligence events are exclusive, day-long experiences designed for firms evaluating Orion's platform and partnership. These immersive sessions offer a hands-on introduction to Orion's people, technology, investment solutions, and operational support—giving advisors the clarity and confidence to take their next step.

From platform demos and investment deep dives to advisor panels and networking dinners, attendees walk away with a full view of how Orion can support their growth.

Why do advisors attend?

- Explore the full breadth of Orion Wealth Management's platform, from technology and investments to operations and onboarding
- Hear directly from Orion clients during a live advisor panel
- Engage with Orion leadership and subject-matter experts
- Build peer connections with other firms exploring similar decisions

What types of firms join?

These events are curated for growth-minded RIA firms and registered reps evaluating Orion's wealth platform and partnership. Attendees typically include firm owners, investment leads, and key decision-makers.

Sponsorship Benefits

- Sponsorship of the pre-event evening dinner, with verbal recognition during the event and up to 10 minutes of speaking time
- Logo placement and sponsor recognition on the official agenda
- Invitation to all content sessions and meals throughout the in-person meeting
- Opportunity to provide branded swag to all attendees
- Opt-in attendee list, including email addresses

Orion Wealth Management Territory Town Halls

Regional Connection Points for Orion Clients

Territory Town Halls are half-day regional events designed to strengthen relationships with Orion's existing clients across the country. These intimate gatherings provide timely updates on Orion's platform evolution, offer valuable investment insights, and foster local community among like-minded advisors.

Led by Orion's sales and subject-matter experts, Territory Town Halls are an efficient and impactful way for advisors to stay informed, engaged, and equipped with actionable ideas to grow their practice.

Why do advisors attend?

- Stay up to date on Orion's latest product
- innovations and roadmap
- Gain timely insights through investment content and market commentary
- Ask questions and get real-time answers from Orion leaders
- Connect with peers in the same geographic region

What types of firms join?

Territory Town Halls are open to Orion's current wealth management clients, with attendees typically including firm principals, investment professionals, and operational leaders across RIAs, hybrids and registered reps.

Sponsorship Benefits

- Logo placement and sponsor recognition on the official agenda
- Invitation to all content sessions and meals throughout the in-person meeting
- Opportunity to nominate a panelist for a session at the event
- Opportunity to provide branded swag to all attendees
- Opt-in attendee list, including email addresses

Align University

What is Align University?

Align University is Orion's premier hands-on training event designed to help advisors and their teams master the full potential of Orion and Redtail technologies. This two-day experience offers a customizable agenda, giving attendees the flexibility to focus on Redtail CRM, Orion's suite of tools, or a combination of both. Through interactive sessions, real-world applications, and one-on-one consultations with expert trainers, participants gain practical knowledge and strategic insight. They leave with the confidence and skills to turn their technology stack into an even more powerful engine—one that enhances client relationships, streamlines operations, and drives business growth.

Why do Orion clients attend?

Attendees join Align University to get hands-on training tailored to their specific role, access live consultations with experts, and collaborate with peers facing similar challenges. Whether learning how to streamline daily workflows or connect Redtail and Orion features for more seamless service, participants gain both practical knowledge and a broader view of how to drive impact through better technology use.

What types of firms join?

Orion and Redtail client firms—often operations staff, client service professionals, and advisors seeking more hands-on, specialized training. Whether part of a solo practice or a larger firm, attendees come to sharpen their skills, troubleshoot real workflows, and deepen their platform knowledge. The event also includes time for 1:1 appointments with Orion and Redtail experts to ensure personalized support and practical takeaways.

Sponsorship Benefits

- Opportunity to nominate a panelist for an education session
- Logo, company blurb, and link on the RTU website
- Sponsor table at the event for direct engagement with attendees
- Inclusion in pre- and post-event promotional emails
- Logo placement and verbal mention during opening remarks
- Post-event opt-in attendee list with contact information
- Opportunity to provide branded swag in welcome bags
- One appreciation social media post during conference
- Opportunity to moderate a roundtable discussion in the strategy room
- Co-sponsored cocktail reception

Redtail University

What is Redtail University?

Redtail University is a high-energy, in-person training experience designed to help Redtail CRM users build confidence, improve efficiency, and fully leverage the platform's capabilities. Known for its fun, fast-paced environment and hands-on approach, RTU brings together users from across the country to deepen their product knowledge and connect with the Redtail team.

Why do clients attend?

Attendees come to Redtail University to gain practical, role-based training that they can immediately apply in their day-to-day work. The experience blends technical instruction with real-world use cases, peer learning, and direct access to Redtail experts. For many, it's also an energizing opportunity to step away from the office and return with new insights—and new enthusiasm—for how technology can help them serve clients more effectively.

What types of firms join?

A mix of RIAs, hybrid firms, and registered reps attend Redtail University, often sending operational team members, CRM administrators, and client service staff. Some attendees are new to the platform, while others return year after year to sharpen their skills, stay current with updates, and discover new tips to improve their workflow.

Sponsorship Benefits

- 10-minute educational presentation during lunch
- Logo, company blurb, and link on the RTU website
- Inclusion in pre- and post-event promotional emails
- Logo placement and verbal mention during opening remarks
- Post-event opt-in attendee list with contact information
- Opportunity to provide branded swag in welcome bags
- Opportunity to moderate a roundtable discussion in the strategy room

Thank you