



# Planet Orion

## Day 1

**7:00 - 8:00am**

Check In / Continental Breakfast

**7:20 - 7:45am**

Sponsor Education Session: Mobile Assistant

**8:00 - 8:15am**

Welcome

**8:30 - 10:00am**

*Deep Dive Workshop: Out of This World Trading*

Trading is a mission-critical part of every financial advisory office. As with every mission-critical component, it's time to take a deep dive on functions and strategies that can help you keep up with the lightspeed demands of your clients.

Key Takeaways:

- *Managing Cash Needs*
- *Track Internal Notes*
- *Advisor Trading*
- *Portfolio Compare*

**10:00 - 10:15am**

Break

**10:15 - 11:45am**

*Deep Dive Workshop: Rocket-Powered Reports*

Just like the ability to communicate with strange new lifeforms is important for space explorers, it's important for you to communicate complex financial concepts and strategies to your clients! Fortunately, Orion Reporting is here to be your universal translator. We'll take a look at our newest reporting features and discuss best practices that will take your reports to infinity and beyond!

Key Takeaways:

- *New Report Templates*
- *Performance Reporting*
- *Customization*

## **12:00 - 1:00pm**

Lunch

## **1:00 - 2:30pm**

*Deep Dive Workshop: Blast Off with Billing*

You need to spend more time exploring the cosmos and less time thinking about how to pay for it. We'll explore our newly revamped Billing App and teach you to harness the full power of this tool to help you get paid faster than ever before!

Key Takeaways:

- *Billing App*
- *Bill Settings and Set Up*
- *Billing Best Practices*

## **2:30 - 2:45pm**

Break

## **2:45 - 4:15pm**

*Deep Dive Workshop: Map Out Client Journeys with Financial Planning*

Traveling the cosmos requires detailed planning to build your star map. Likewise, advisors can leverage Orion's Planning tools to map out their clients' futures in a way that will take them to heights never thought possible!

Key Takeaways:

- *Planning Workflows*
- *Behavioral Finance*
- *Simulations & Scenarios*

## **5:00 - 6:00pm**

Cocktail Hour

*1:1 Consultation Appointments will be available throughout the day.  
Exact times and instructions to schedule will be sent prior to the event.*

# Day 2

## 7:15 - 8:00am

Check In/Continental Breakfast

## 8:00 - 8:15am

Blast Off

## 8:15 - 9:15am

*Navigate Your Financial Galaxy With Ease*

Operating your spacecraft requires you to know every button and switch and what it does. Orion's Portfolio Dashboard provides an intuitive, customizable interface for you to navigate through all the financial data of your clients in order to serve them best.

Key Takeaways:

- *Dashboard*
- *Portfolio View*
- *Portfolio Audit*

## 9:15 - 10:15am

*Houston, We're Avoiding Problems*

In order to avoid any rough patches in your journey through the stars, you need to be able to not only get performance data quickly and easily, but also be able to effectively communicate that information to your clients in compelling, easy-to-understand ways.

Key Takeaways:

- *Data Queries*
- *Reports*
- *Performance*

## 10:15 - 10:30am

Break

## 10:30 - 11:30am

*A Different Kind of Data in Space*

*No, we're not talking about the android from Star Trek. In this session, we focus on how data flows into Orion and how you can support the mission of keeping it clean and organized by adopting our best practices for database maintenance.*

Key Takeaways:

- *Data Best Practices*
- *Database Setup*
- *New Accounts*

## **11:30am - 12:45pm**

Lunch

## **12:45 - 1:45pm**

*Space Exploration Isn't Free, After All*

You need to spend more time exploring the cosmos and less time thinking about how to pay for it. Lucky for you, Orion's Billing helps you calculate fees, create custom fee and payout schedules, and get paid faster than before!

Key Takeaways:

- *Billing App*
- *Bill Settings*
- *Quarter End Dashboard*

## **1:45 - 2:00pm**

Break

## **2:00 - 3:00pm**

*Ground Control, Do You Read Us?*

Communication is a key aspect of space travel, and it's also a key aspect of interacting with your clients. Fortunately, Orion has tools that can help you communicate with your clients that are better than any galactic radio!

Key Takeaways:

- *Client Portal*
- *Financial Planning*

## **3:00 - 3:15pm**

Wrap Up/Q&A