

Accelerate Digital Experiences and Improve Efficiency with Orion + BNY Mellon | Pershing



By combining Orion's integrated technology platform with BNY Mellon | Pershing's NetX360® professional workstation, we empower you to utilize new digital experiences that are tailored to support your firm's unique vision and strategy.

Key Integration Points

Now, it's easier than ever to seamlessly access and work between the NetX360 and Orion platforms through our bi-directional single sign-on that offers:



A direct connection between NetX360 and Orion Connect

without the need to login each and every time you want to access these platforms



An enhanced experience and smarter navigation

helping you move seamlessly between the two solutions including main landing pages, specific account records, key workflows and more



Immediate delivery of Pershing statements,

trade confirms, tax documents and notifications from the past two years, directly to investors through Orion's new Client Portal

Coming soon: We'll deploy additional enhancements to our API connectivity that will allow for real-time access to Pershing data, delivering positions, balances and activity faster than ever before.

Navigating Between Two Powerful Tools

Leveraging the benefits of our integration from either NetX360 or Orion Connect you can easily land on...



From NetX360 to Orion Connect:

- Homescreen dashboard
- Account views



From Orion Connect to NetX360's:

- Fee center
- Holdings page
- Account balances (cash movement)
- Report center
- Items for Attention (IFAs)
- Loan calculator

LEARN MORE



Current Orion users:

sme-integrations@orion.com
or 888.695.0523

Not already using Orion?

info@orion.com
or 402.496.3513

Disclaimer: Orion does not endorse any particular third-party product or service. Our clients should undertake their own assessments to determine whether these parties meet their business and due diligence requirements.

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