Financial Advocates™
Bridging Alliances for Advisors

ORION

ORION FOR FINANCIAL ADVOCATES

Integration Independence = Better Practice Management

Financial Advocates and Orion have partnered together to bring financial advisors data integration independence. Finally have the flexibility to decide how and where to integrate your data. Orion's secure cloud-platform allows you to access and manage your client data wherever you are!

HISTORICAL DATA
for detailed reports and analysis.

CONSOLIDATED REPORTS
deliver an up-to-date, holistic financial picture.

INTERACTIVE, ONLINE PRESENTATION TOOLS
facilitate better discussions and make it easy to record client feedback.

ONE ADVISOR DESKTOP
integrates with your CRM, financial planning software, work flow efficiency solution and more.

MULTI-CUSTODIAL AND BROKER-DEALER INTEGRATIONS
with LPL, Fidelity, TD Ameritrade, Charles Schwab and many others.

BRANDED CLIENT PORTAL WITH WEALTH ACCESS
aggregates held-away accounts, opening the door for your analysis and input.

Financial Advocates' corporate advisors, hybrid advisors and those on their way to pure independence receive these exclusive benefits:

- Custom Dashboards – Pre-built by Financial Advocates with tiles already selected for you.
- No Interruption in Service – Continue to work even if your custodial solutions are not available.
- Enhancements Built for You – Your feedback and insight go into every new release!
- FAIM Support – Receive specialized support and training from those you know.
- No Account Minimum Requirement – Our enterprise partnership alleviates you from having to maintain an account minimum.
- We partner with Orion to do the heavy lifting - Your client list and data is prepared then uploaded by Financial Advocates.

Learn More About Integration Independence. Contact Us Now! (360) 866-2345