











When compared to your previous provider or other providers you considered, please rate Orion’s tools and capabilities.

	Best in Class	Significantly Better	Better	Not Better	Unsure
Reporting (Report Builder, Composites, Alternative Investments Platform, RMD Dashboard, etc)	 13%	 43%	 30%	 11%	 3%
Billing	 17%	 40%	 26%	 5%	 12%
Trading (Integrated Trading and Rebalancing)	 13%	 33%	 21%	 13%	 20%
Client Experience	 8%	 36%	 30%	 11%	 15%
Integrations	 11%	 48%	 29%	 3%	 9%

Source: TechValidate survey of 239 users of Orion Advisor Tech

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TechValidate  
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