ORION
PORTFOLIO SOLUTIONS

Proposal Generation System Transition FAQs

Q. What's Replacing My Proposal Generation System?

A. Orion Portfolio Solutions is excited to announce that our current proposal generation system will be replaced with new, proprietary technology.

For an advisor, the ability to win and onboard new clients is essential to building a strong and healthy business. And we've long supported advisors through a step-based proposal generation process that makes building well-diversified UMA portfolios easy. With this new technology launch, we are enhancing that step-by-step proposal framework with:

1. **A modernized user interface—one that further supports intuitive and streamlined proposal workflows:**

   The new interface better resonates with the Orion brand and is designed to make finding, reviewing, and completing required actions simple.

2. **A more robust investment selection dashboard:**

   We previously made building well-diversified UMA portfolios easy. Through the new technology launch, we will continue to do that, but through an investment selection dashboard that delivers a more fluid connection between proposal types (Single Strategy, UMA, Rep as PM). Additionally, the new investment selection dashboard provides new portfolio insights, on the fly. As you construct your portfolio, much in the same way you did in the legacy system, you'll notice a display of real-time updates to portfolio Alpha, Beta, R-Squared, and Max-Drawdown. You'll also gain the ability to toggle asset summaries by Mandate and Asset Class.

3. **Enhanced Proposal Documentation:**

   An updated proposal delivery dashboard provides increased flexibility in selecting and modifying proposal documentation to best suit your investment story and client. The new proposal output will receive a face-lift, with the goal of increased readability and investment clarity throughout. And beyond adding or removing proposal elements (like risk tolerance assessment recap, investment story, etc.), you can also reorder them.

Q. Why is Orion Portfolio Solutions Changing Proposal Generation Systems?

A. There are multiple benefits delivered through this new technology launch. First and foremost, we seek to improve the advisor and client experience. The enhancements are designed to help you more easily and confidently create well-diversified and client-aligned portfolios. And with improved proposal delivery options, your clients will enjoy a more professional, clear, and helpful experience.

Also, bringing the proposal system in-house gives us increased ability to build upon these enhancements. You can expect additional functionality improvements and additions in the coming months (hint hint: additional investment stories, tax-managed options, and increased connectivity to the new account process).

Q. When Will This Change Occur?

A. The legacy proposal system will be shut down the evening of **Friday, July 24**. You may experience proposal outages as our team works to transition technologies. The new proposal system will be activated throughout the following weekend, and available for full use on **Monday, July 27**.

Q. What Will Happen to My Proposal Data?

A. Your historical proposal data will be transitioned to the new system, automatically. Beginning **Friday, July 24**, our internal data team will run a secure data sync between the two proposal generation systems.

Q. Where Can I Go to Learn More?

A. Information related to the proposal generation launch, as well as our July investment process enhancements, can be found in our Enhancements Resource Center. As new information and resources become available, it'll be hosted within the resource center. **Click here** to learn more.

You can also join us on July 27 at 4:00 PM EST for a guided demo of the new proposal generation system. **Click here** to register.

Q. Will Training Resources Be Made Available?

A. Yes! A tutorial will be available within the proposal generation system at launch. Simply click the i badge available in the initial step of the proposal process, and watch a short video walk through of the new technology.

Q. Who Should I Contact with Questions?

For more information about the risk changes, please reach out to your Orion Portfolio Solutions Regional Sales Team at 800-379-2513, option 1.

Questions about Risk?

Please reach out to your Orion Portfolio Solutions Regional Sales Team at 800-379-2513, option 1

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