



Orion's Integration of FactSet's Robust Research and Analytics Allows Advisors to Better Serve Their HNW and Institutional Clients

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Orion Advisor Services, LLC ("Orion"), a premier portfolio accounting service provider for financial advisors, has announced it is now integrated with FactSet, a leading provider of financial data, analytics, and service, to offer its advisor clients easy access to portfolio research and analytics. The integration allows client portfolios and models to be seamlessly and securely imported from the Orion platform into FactSet. From there, advisors can run performance attribution and analyze portfolio exposures on multi-asset class portfolios.

"Integrating with FactSet allows us to provide advisors serving high-net-worth investors with another option to access detailed and powerful analysis tools at their fingertips," said Orion CEO Eric Clarke. "FactSet will be able to offer our advisors the research and analytics their high-net-worth and institutional clients demand."

Through the new integration with Orion, advisors can use FactSet as a single point of entry for their portfolio, research, and markets analysis needs. This eliminates the need for advisors to access multiple platforms for this information, enabling them to spend more time with their clients and prospects.

"FactSet has partnered with institutional asset managers to address their multi-asset class attribution and risk management workflows for over 30 years," explained Mike Medvinsky, Director of FactSet's Americas Wealth Management business. "That institutional offering is now packaged for Wealth Management firms, and with Channel Partners like Orion, our clients are well positioned to address the evolving needs and requirements of their high-net worth (HNW) and Institutional clients and prospects."

About Orion

Orion Advisor Services, LLC (Orion) is the premier portfolio accounting service provider for advisors. Our firm has unique insights into the advisory profession because it was founded for investment advisors by an investment advisor in 1999. Orion frees advisors from back-office tedium so they can enjoy their business again by devoting their time and energy to better serving clients. Orion provides the integrated and fully customizable technology solutions that advisors need to help grow their businesses over the long term. The firm's technology solutions empower more than 800 advisory firms with total assets under administration in excess of \$275 billion, from more than 1,250,000 individual accounts.