

Our advice business is changing!

Information Tsunami: Cutting through the noise using Orion Portfolios Unique Advisory Strategy

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Agenda



The challenges in the investment advice business

A conversation that just might cut through

Orion Portfolio Solutions Market Cycle Mandates

Final thoughts

Q &A

Noise, noise. Noise....



Information is overwhelming our clients everyday

We live in a world that talks too much!

Facts and Figures are mind numbing, distorting and momentary.

Memory becomes selective with only a few ideas making it through

Trust harder to build as folks pulled into many directions

Skeptical of much they hear, read and view in todays world





Questions, questions, questions

Are rates historically high?

What happened to the trusty 60/40 portfolio in 2022?

US market overpriced?

Concentration risk is real?

A message



Information Tsunami....it all starts to sound the same

No approach works all the time... you can't throw the same pitch over and over

Historical track records... looking at the past 5 Super Bowl winners to pick the next 3!

Casino mentality has taken over.....information instantly!

Your Investment Counsel



3 things every advisor does and clients don't realize of fully appreciate

Right Now: you are here doing investigation, research, validation and resourcing tools and strategies to help with your advice model (take a picture for Social media!!)

Ongoing: you are watching the economy, markets, trends, etc...and monitoring client emotions all the time. (We are part time psychologists!!)

Meanwhile: technology changes, staff needs hiring & training, data protections increase, compliance challenges grow, competition lurks... (and clients want lower fees??)

It's a very rewarding , but difficult business!

A conversation that might break through



It begins.....Setting the stage properly

Markets go through cycles... you and your client will live through several..
(I remember the DOT.com bust...ugggh!!)

Human behavior is hard wired, to a large degree ,so responses to markets are predictable.
(client fear loss better than enjoying gains, recency bias & anchoring bias)

If you set the stage the client conversation might be better...

Starting the Conversation



3 basic questions for advisors to set the stage

1. Mr. Client, would you want to keep a portion of your **portfolio fully invested** in the stock market for the long-term, riding out the ups and downs?
2. Mr Client, would prefer a portion of your **portfolio adjusted regularly** to respond to changes in markets, the economy, and interest rates?
3. Mr Client, would you preferable a portion of your portfolio to be **focused on loss avoidance** possibly giving up significant upside growth?

Yes ,No, Maybe !

Building a portfolio



The tools

Professional managers.... They are the experts

Using varying approaches with different strategies creates intellectual diversity

Calibrate portfolio to the client & then recalibrate as client & market circumstances dictate



Market Cycle Mandates



Market Cycle Mandates



A Sample Portfolio



Thank You

