



FOR IMMEDIATE RELEASE

August 29, 2008

Contact: Meghan Dougherty - Dougherty Relations
(303) 331-6887 - meghan@meghandougherty.com

**CUSTOMIZED REPORTS BRING BUSINESS METRICS
INTO FOCUS FOR ORION CLIENTS**

New Business Metrics Reports from Orion Advisor Services Offer Advisors a Business “Check Up” and Snapshot of Profitability in Key Areas

OMAHA, NE—New customized business metrics reports from Orion Advisor Services present financial advisors with a critical view of their businesses that help monitor profitability in a down market.

Similar to services its financial advisors provide—a concise snapshot of their retirement investment progress—Orion now offers financial advisors their own business check up. The new service includes regular reports that identify key performance indicators for financial advisors.

“We are finding that with today’s hobbled economy our clients more than ever are demanding tools to help them stay profitable,” said Eric Clarke, President of Orion Advisor Services. “Our clients will provide better service to their customers and attract new clients more successfully by knowing the areas they excel and the areas that need work.”

“Because Orion’s technology is so comprehensive, we can process and interpret data down to the micro unit,” added Clarke. “The way we’ve structured our services allows us to ‘slice and dice’ clients’ data in ways that help them be even more successful. Business metrics reports are just one example.”

- More -

Comprehensive charts and graphs illustrate performance indicators in an array of business areas. For example, business metrics reports compare firms' productivity such as asset growth versus market growth, top performers versus average counterparts and new accounts against current accounts. For example:

- *Asset Growth Against Market Growth* – compares a firm's assets under management versus the growth of selected market indices
- *AUM Growth and Attrition Factors* - compares by percentage the growth and attrition factors that influence a firm's overall growth
- *Accounts and Representatives* - tracks new accounts versus closed accounts, relative to new representatives
- *Asset-, Client- and Revenue-Based Productivity* - tracks the size of the firm relative to revenue – determines how bringing on more accounts, clients or staff affects productivity
- *System Data* - detailed web login analytics at all login levels
- *Top Versus Average Clients, Broker/Dealers, Representatives* - compares top clients, B/Ds and representatives with the average in each respective category
- *Accounts per Asset Range* - details both how many accounts and how much in assets a company manages within each asset range
- *AUM by Month, Custodian, Fund Family* – detailed AUM break downs

About Orion Advisor Services

Orion enables RIAs and broker/dealers to outsource time-consuming back-office tasks and refocus on building revenue. A comprehensive solution created by and for fee-based advisors, Orion's service bureau and portfolio management system is customizable for a firm's business model and scalable to meet their growing needs. Orion handles tasks like daily database reconciliation, statement generation and delivery, and advisory fee billing, allowing firms to redirect efforts towards building relationships and managing money. Orion's Internet-based system gives firms immediate access to client data, and delivers powerful tools like customizable reporting, built-in CRM and document imaging, and integration with several financial planning applications. The company currently has more than \$26

billion in assets under administration and serves more than 150 financial advisors. Contact Orion Advisor Services at (402) 496-3513, option 2, or at www.orionadvisor.com.

#