



CUSTOMIZED. TAX-EFFICIENT. TECH-ENABLED.

# Orion Custom Indexing



Scale your practice by having the power of Orion's Custom Indexing technology in your hands.

## Key Features and Benefits



### Tax Transition

Generate new business and grow your assets under management through Orion's tax transition software.



### Automatic Tax Loss Harvesting

Scale your back-office by leveraging our automated daily tax loss harvesting component.



### ESG, SRI, & Faith-Based Investing

Improve client retention and building deeper client relationships by aligning with a client's portfolio with their beliefs.

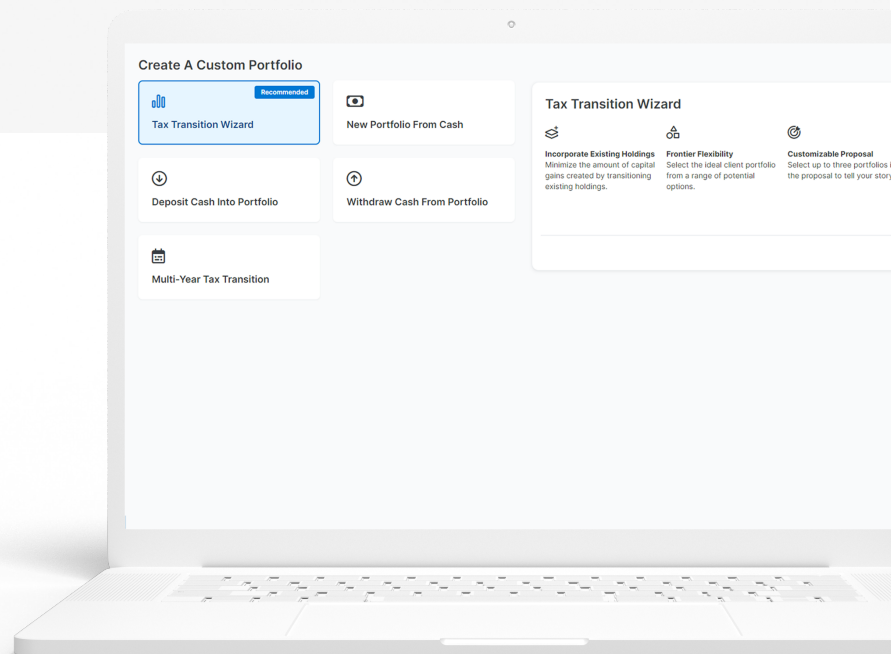


### Investment Customization

Differentiate from the competition by utilizing the separate account structure to unwrap and customize a client's portfolio.

## Bring the Investor Story to Life

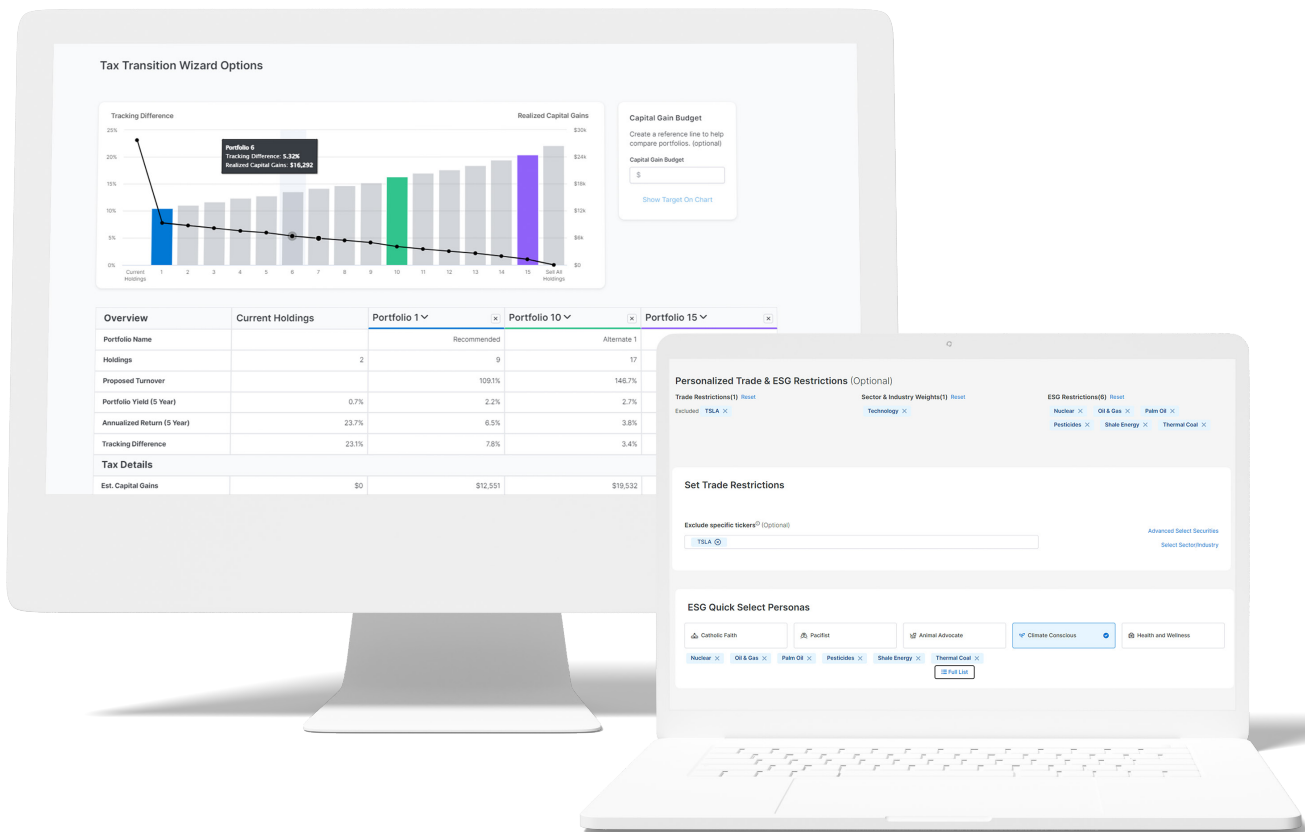
Avoid the time-consuming and repetitive work of tax transitioning portfolios and generate a customized proposal in under 5 minutes.





## Demonstrate your value to clients by customizing their portfolios through a variety of options, including:

- Managing concentrated positions
- Setting personalized capital gain budgets
- Track trading restrictions, preferences, and ESG preferences using the custom persona builder experience
- Customizing the number of holdings
- Reporting on a client's cumulative tax savings



Reach out to your Orion Custom Indexing Team to learn more about how you can gain an edge by incorporating Custom Indexing into your practice.