

# Offering Advisors a New Way to Connect Behavioral Finance to Risk Analytics



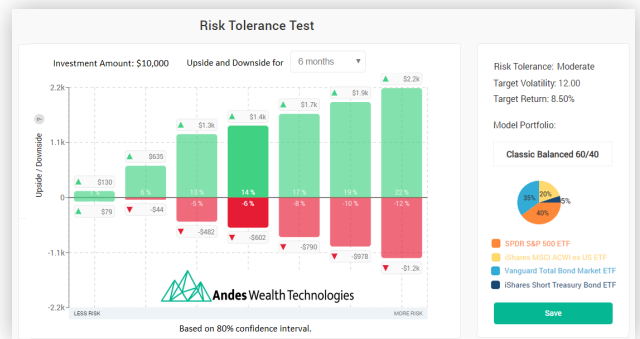
Behavioral finance and risk analytics have never been more critical for creating a satisfying and successful investment experience for clients. As a result, advisors are looking for actionable ways to tie risk and behavioral data to their investment decisions, creating trust and transparency that strengthens the advisor-client journey.



## Bringing BeFi and Risk Analytics Together: Orion and Andes Wealth

### Who is Andes Wealth?

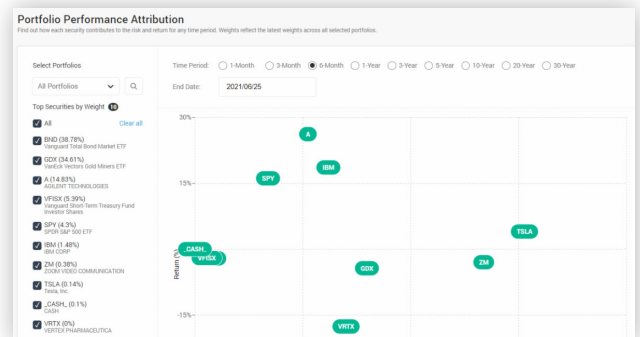
Andes Wealth Technologies combines behavioral finance with risk visualization to provide a new way to deliver wealth management services, offering advisors a comprehensive and robust client onboarding and communication technology solution.



## How Orion and Andes Wealth Work Together

Advisors using both Orion and Andes Wealth can save time and increase efficiency by syncing all existing Orion household and account data right into the Andes Wealth platform, enabling them to:

- Seamlessly move a client from risk profiling to portfolio model selection and ongoing monitoring, all while applying behavioral finance concepts.
- Improve transparency through the industry's most comprehensive, yet digestible, Investment Policy Statement (IPS).
- Help advisors effectively tell the long-term story during market turmoil using a combination of portfolio analytics and behavioral finance.



Harness the power of behavioral finance and risk analytics to strengthen your client relationships and ultimately improve the advisor-client journey.

## Ready to Get Started?

Orion clients already using the Andes Wealth platform: No additional cost. Reach out to: [sme-integration@orion.com](mailto:sme-integration@orion.com)

Not already an Orion client? Reach out to [info@orion.com](mailto:info@orion.com) or visit <https://orionadvisortech.com/contact/>