Beyond Rebalancing

ORION ADVISOR TECH

eclipse

Eclipse provides an integrated and fully customizable trading and rebalancing platform for advisors in Orion Connect. Tailor the experience to your needs and provide greater value to clients with more efficient trading processes.

Features

PORTFOLIO-LEVEL TRADING

Trade and rebalance complete portfolios to increase your trading desk's efficiency and scale back your number of orders. Instead of trading one account at a time, Eclipse allows you to gain scale by choosing the option best for your firm.

Eclipse has the flexibility to adapt to your preferences, and allows you to trade at the Household, Account, or Sleeve Level.

TRUE CUSTOMIZATION

Your firm's trading needs are as unique as your reporting and billing setup, and it's time you had a system that gave you the controls to make it your own. Set it how you want, and trade as uniquely as you want.

You can set up tax loss harvesting requirements specific to an individual client, or be more aggressive with gains for one client than with another. True trading customization assists you with your fiduciary responsibility to your clients.

TAXES–ANYWAY YOU WANT TO LOOK AT IT

The customizability of Eclipse means you can achieve the tax efficient settings that make the most sense for your clients. The platform will even help by offering trading suggestions to minimize taxable gains.

You can increase or decrease tax sensitivity for each client, or focus on taking taxable gains for specific clients as needed. We give you the keys to set your ticker swaps and asset classes so you have more options with Eclipse.

FIX INTEGRATION

Skip the trade file and gain time back with Orion's FIX Integration. FIX sends your trade orders directly to participating custodians so you no longer have to download, upload, and check your orders manually.

ACTIONABLE DASHBOARDS

Eclipse offers daily data analysis dashboards so you can create simple workflows and take quick action when it's needed. With dashboards, you'll know when a portfolio is out-of-tolerance and needs rebalancing, when you have a tax-loss harvesting opportunity, or when cash is over or under target. Eclipse gives you the power to adjust your portfolios on the fly.

CASH MANAGEMENT

Eclipse monitors cash requirements in portfolios and makes it easy to raise or spend cash with the click of a button. You'll have unlimited cash buckets, so you can notate cash requirements for billing, monthly distributions, one-off cash distribution requests, and more permanent set-aside cash requirements.

Eclipse monitors your requirements to let you know if a portfolio is over or underweight. Additionally, Eclipse alerts you of any contributions and distributions hitting an account.

SCALED FOR ANY NEED

Eclipse is powered by scalable data servers that intelligently allocate resources as they're needed, so the system doesn't slow down. Eclipse runs smooth whether you're placing 500 trades or 5,000.

TAX-LOSS HARVESTING

Eclipse monitors all your portfolios each day for tax-loss harvesting opportunities. Tax-Loss Harvesting requirements can be setup for each client so you harvest losses according to your specific criteria. With a click of a button, you can harvest losses for your clients on a daily basis if wanted.

CONTACT US TODAY

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