



## Integration with Orion



For wealth management firms, advisors, and client services teams who use Orion, you can now enjoy seamless integration of Max, the industry-leading cash management solution, with the Orion client portal and Orion Connect.

### Integration Benefits

Clients appreciate Max's industry-leading cash management solution, whether they use it for a set amount of cash (such as an emergency fund) or to earn more than a money market fund on cash in their portfolio. In today's interest rate environment, every basis point counts.

You can now report on your clients' balances held in FDIC-insured, online savings accounts using the Max For Advisors integration available through the Integration Center on **Orion Connect**.

### How It Works

You want aggregation without aggravation, so we designed our integration so that your clients don't have to lift a finger.

Once the Max For Advisors integration is enabled by your Orion administrator and you've authenticated with your Max Advisor Dashboard credentials on the Orion site, your clients' balances will be sent to Orion each night, automatically.

You can use all the power of Orion to designate each account as you see fit, denoting it as unmanaged or managed, included in the asset allocation or not, and billable or not.

Note: If you need real-time balances, login to the Max Advisor Dashboard and click "Refresh" to refresh balances. Updated balances will be reported on Orion the next day.

### Get Started Today

To get started, have your Orion administrator enable the **Max For Advisors** integration so that it will appear on Orion Connect for advisors and client services teams. Next, the advisor will single-sign-on (SSO) from Orion Connect to their Max Advisor Dashboard to enable the secure flow of client data. You can also ask your admin to set up all of the advisors at your firm at once by emailing [advisors@maxmyinterest.com](mailto:advisors@maxmyinterest.com).

Detailed instructions for enabling the integration are available from Orion. If you need help enabling the integration, please contact Orion using the Support tab on Orion Connect.

**To learn more, contact [advisors@maxmyinterest.com](mailto:advisors@maxmyinterest.com) or visit [MaxForAdvisors.com](https://www.maxforadvisors.com).**