

First Affirmative to Upgrade our Portfolio Management Software **By Amy Thacker**

It is hard to believe that we are halfway through summer and working our way to fall! The past 11 months have been a flurry of activity for First Affirmative Financial Network.



In case you missed it, First Affirmative was recognized as one of the Best for the World™ B Corps in July! The Best for the World are B Corps whose scores, in one or more of the five impact areas assessed, reach the top 5% of all B Corps worldwide. As all B Corps are already businesses that meet the highest standards of verified social and environmental performance, public transparency, and legal accountability to balance profit and purpose - this is a recognition that makes us incredibly proud!

First Affirmative Financial Network officially became an independent, 100% employee-owned organization on September 18, 2020. This occurred when Folio Financial was purchased by Goldman Sachs and First Affirmative was spun off. As part of our ongoing commitment to advisors and their clients, we evaluated what we need to do to ensure we can meet your current and future needs. Part of this evaluation included the acknowledgement that we needed to sunset some of our outdated technology and begin the process of converting our portfolio management processes to the Orion Advisor Technology platform.

We have been onboarding with Orion Technology Solutions since early 2021, and we are excited to announce that we will be fully live on Orion in the third quarter of 2021. Our side-by-side onboarding effort has allowed us to run our systems concurrently to ensure accuracy and stability.

Orion Advisor tech is an unrivaled technology platform with 100+ integrations. The transition to Orion will allow us to have our advisor and client portals, quarterly reporting, quarterly invoicing, and trading all on one platform.



Here are some of the changes you can expect to see as part of this transition:

- Enhanced reporting
- Increased security
- A modernized interface that will allow for point and click navigation and on-line support from Orion
- Ability to view your data and statements, and retrieve firm commentaries at your convenience
- A white label experience for Advisors

The advisor-client relationship is core to what we do, and we feel Orion will allow these relationships to be strengthened and redefine your experience. Thank you for your trust in First Affirmative, and we look forward to enhancing your experience with your Advisor and our Team.

You will see additional communication from First Affirmative as we roll out and begin to utilize the enhanced Client and Advisor portals. If you have questions, please reach out to us at businessdevelopment@firstaffirmative.com or 719-478-7036.



First Affirmative Financial Network

5475 Mark Dabling Boulevard, Suite 108, Colorado Springs, Colorado 80918
719-478-7036 | www.firstaffirmative.com
Registered Investment Advisor (SEC File #801-56587)

Advisor Inquiries

phone: 719-478-7036

businessdevelopment@firstaffirmative.com

Service Inquiries

phone: 719-478-7036

service@firstaffirmative.com