

## **Orion Advisor Services, LLC and Total Rebalance Expert (TRX) Form Joint Venture; Announce Technology Integration**

***Combination of tax-efficient rebalancing technology with leading portfolio management and reporting system will create an independent “Total Technology Platform” for advisors to streamline portfolio management***

San Diego, CA and Omaha, NE, March 25, 2014 – [Total Rebalance Expert](#) (TRX) and [Orion Advisor Services, LLC \(Orion\)](#) announced today a joint venture between the two companies to provide a “Total Technology Platform” designed to simplify and streamline the portfolio management process. By integrating the two industry-leading platforms, advisors will be able to utilize a comprehensive, end-to-end portfolio management and rebalancing solution.

“We are delighted to join forces with Orion to create this historic venture,” said Sheryl Rowling, CEO of TRX. “By integrating TRX into the core Orion offering, advisors will have a new, complete portfolio management and rebalancing system that will rival anything on the market today.”

“Adding TRX to the Orion platform creates a ‘best of breed’ offering for advisors that is independent, multi-custodian, and will be available immediately to our advisors,” said Eric Clarke, CEO of Orion.

As part of the integration, advisors will be able to access TRX directly through the Orion platform. This comprehensive solution will provide household-level rebalancing and tax efficiency in a cloud-based model, simplifying the portfolio management process. Direct data integrations between TRX and Orion will streamline advisor workflows, providing firms with the ability to report on and manage assets at multiple custodians as well as assets held-away at other institutions.

Both TRX and Orion will continue to remain open-architecture platforms by developing and enhancing integrations with other leading industry portfolio management and rebalancing solutions, providing advisors with choice, flexibility and the ability to maximize their current technology investments.

“We are excited and look forward to providing the industry with a total technology platform,” Clarke said. “The unique combination of TRX and Orion will be able to

drive efficiencies for advisors' investment processes, leading to lower costs and an enhanced service model."

"Our experience as a CPA advisor and the creators of TRX position us well to bring a tax-efficient and technology-enabled portfolio management platform," said Rowling. "Through our unique partnership with Orion we will be able to change the dynamics for how advisors access portfolio management services and technology while also providing added benefits to the entire investment management industry."

To learn more, please visit [www.trxpert.com](http://www.trxpert.com) and [www.orionadvisor.com](http://www.orionadvisor.com).

### **About Orion Advisor Services, LLC**

Orion Advisor Services, LLC ("Orion") is a premier portfolio accounting service provider founded by and for investment advisors. Orion's mission is to liberate advisors from their back offices so they can enjoy the client relationship side of their business again. Process-driven solutions bring efficiencies to operational areas including new account set up, trading, reconciliation, fee billing, and client communications. Orion services feature the integration, scale, and customization advisors need to support business growth.

Founded a decade ago, Orion was formed to address the technology needs of its sister company, a fee-only independent registered investment adviser whose growth was constrained by its existing portfolio management platform. Unable to find the right solution, Orion built its own. Today, the firm empowers over 400 advisors and administrates over \$150 billion in assets for more than 650,000 accounts. For more information about Orion, visit [www.orionadvisor.com](http://www.orionadvisor.com).

### **About Total Rebalance Expert**

Founded in 2008, TRX is the industry's leading independent portfolio rebalancing software platform. TRX provides financial professionals with a tax efficient and robust online software solution that provides advanced functionality to streamline the rebalancing process. Designed by an industry leading CPA advisor, TRX automates the complexities involved in rebalancing portfolios, enabling advisors to save time, eliminate errors and free them up to grow their firms and better serve their clients. TRX is headquartered in San Diego, Calif., and has offices in Kansas City, MO and Portland, OR. [www.trxpert.com](http://www.trxpert.com)

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