Advisors Excel invests in technology to integrate annuities and investments

By Editorial Staff *Thu, Jul 7, 2016*

Orion will provide back-office services related to reporting, billing and client statements, integrating the investment, annuity, and life insurance products on AE Wealth Management's client relationship management (CRM) platform.

Advisors Excel, a registered investment advisor (RIA) and field marketing organization (FMO) for investment advisors and independent insurance agents based in Topeka, Kansas, will use Orion Advisor Services, LLC, a portfolio accounting service provider, to support its RIA, called AE Wealth Management.

Orion will provide back-office services related to reporting, billing and client statements. It will integrate the investment, annuity, and life insurance products on AE Wealth Management's client relationship management (CRM) platform.

Orion's "dashboards aggregate data [and] provide performance reporting, customized client statement and the fee billing structure," said Cody Foster, Advisors Excel co-founder, in a release.

Orion Advisor Services was founded "for investment advisors by an investment advisor in 1999," according to the release. The firm's technology solutions are used by over 900 advisory firms with total assets under administration of more than $300 billion in more than one million individual accounts.