

LVC Consulting

Orion || Eclipse || Redtail

LVC

-CONSULTING-

Orion Done Right



At a Glance

We are a specialized partner for RIAs using Orion. Whether it is a full conversion, Eclipse trading, billing cleanup, or anything across the Orion platform, we manage back-end execution so your team moves faster, with fewer delays and less risk.

350+

Engagements delivered since inception

150+

Unique RIAs served

50+

Combined Years of Orion Experience

Trust

Many long-term and repeat customers

What Makes us Different?

We operate as part of your team from day one—joining your calls and owning the details. Whether it is hands-on configuration or just getting it done for you, we make Orion work the way you need it to.

Subject Matter Experts

Lisa Valentine— Expert on all things Orion: database foundation and best practices.

Candy Chrisman— Orion and Redtail specialist focused on training, efficiency, and clean execution.

Brian Nelson— Expert on all things Eclipse: trading setup, tools, and optimization.

Paul Zappala— Orion operations support specialist focused on billing, reporting, data workflows.

Core Services

- Conversions and implementations including setup, data validation, and training
- Eclipse trading optimization across models, tools, and workflows
- SOP and training development for advisor and operations teams
- Custom reporting, performance reviews, and quarter-end processes
- Redtail setup, workflow configuration, and team adoption
- Billing and database cleanup including fee logic, householding, and role structure
- Ongoing Orion support including outsourced billing and system maintenance

Connect with us

