

Operational Expertise for RIAs Using Orion Advisor Tech

LVC Consulting supports every phase of Orion use, bringing clarity and structure to setup, data validation, Eclipse trading, and billing.



Our Core Services

Conversions & Implementations

- Discovery & intermediary support
- Orion database configuration
- MCL creation/assistance
- Product classification
- Fee schedule + billing setup
- Historical data validation
- Performance comparisons
- Custom reporting
- Best practices documentation
- Training (group and individuals at all levels)

Comprehensive Database Review

- Firm settings
- Householding
- Products and prices
- Performance batches and benchmarking
- Bill instances
- Custom reports and report batches
- Logins and roles
- Client portal
- Available dashboards and views
- Review current vs. best practices

- Model & portfolio setup
- Trade tool optimization
- Cash management
- Out-of-tolerance workflows
- Position equivalents & alternates
- Tactical tool setup
- Sleeve, household, and account-level trading
- Tax-loss harvesting workflows
- Fully customized Eclipse workflows

Eclipse Setup & Trading Optimization

- Redtail SOP review
- Template creation
- Workflow review/improvements

Redtail Support

Outsourced Orion Billing and Maintenance

- Ongoing training (group and individuals at all levels)
- Maintain fee and payout schedules
- Monthly performance reviews
- Billing forecasts
- Monthly/quarterly fee generation
- Monthly/quarterly report batches
- Monthly/quarterly database audits

Learn More:
lvcconsulting.net



Partner with Us

Book Orion
Consult Call:



Book Eclipse
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