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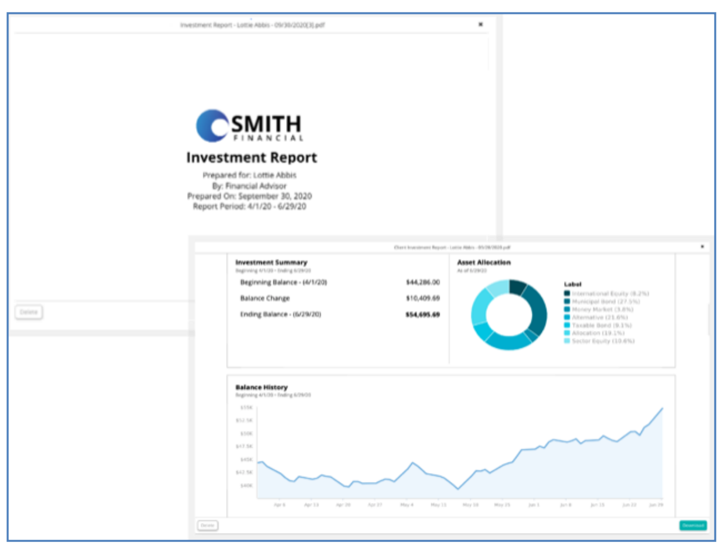
Oranj Adds Reporting Feature to its Platform for Financial Advisors

Investment reports that allow advisors to quickly and easily generate detailed client communications

CHICAGO [October 8, 2020] – Oranj, a single platform for financial advisors to streamline portfolio management and client service, today announced the launch of its new Investment Reporting feature on the Oranj platform.

The Oranj Investment Reporting feature is designed to be straightforward, with easy-to-produce and explain investment reports that deliver the details that matter to clients. The feature takes the complexity out of investment reporting, providing information that enhances—without dominating—client discussions. Advisors can easily generate investment reports across their entire practice.



"Development of our new Reporting feature was driven by the recognition that advisors need to provide reporting capabilities that are simple to produce while also giving clients the level of detail they want," said David Lyon, Founder and CEO of Oranj. "Feature and enhancement development work at Oranj is also greatly influenced by requests from the advisors who use our platform. Their input is vital to providing ongoing enhancements that meet advisors' needs."

Advisors who had early access during the beta launch are enthusiastic about the new Reporting feature. "The investment report looks very simple for the client," said Gina Johnson, RWM Asset Management, LLC. "It is easy to read, which is something we've struggled with in the past. Too much information can overwhelm the client."

Here are some of the distinguishing factors related to the Oranj Reporting Feature:

Client & Advisor Friendly: Whether an advisor runs their business at the client or household level, the Oranj investment report provides a holistic view of clients' investment accounts, even across multiple custodians, all on one platform. The report is concise and straightforward, providing the level of detail clients want to know about their portfolios.

Ease of Implementation: The Oranj Reporting feature removes the complexity from reporting. On one platform, advisors have a streamlined, intuitive tool to generate reports and easily distribute them to clients.

Cost Efficient: The Reporting feature is included in an Oranj Pro subscription. The low monthly fee gives access to each advisor in a firm without the expense of a platform migration or having to buy additional seats.

White-Labeled: The report is customizable to an advisor's business. The cover sheet displays the advisory firm's logo. Advisors can select the reporting time period that works best for their clients.

Report Details: Each report includes a list of household accounts and portfolios, balance history, asset allocation and balance change over the selected time frame. Depending on the data available at the custodian level, reports can also include: time-weighted rate of return for each household account / portfolio, net contributions for each managed account, and management fees charged to the managed accounts.

Simple Process: Advisors simply select a client(s) or household(s) across their entire book of business, identify the time frame and, in the click of a button, generate investment reports that can then be previewed and shared with clients. The document "share" button will trigger a client notification that the report is available in their vault.

Reporting Period: Advisors can select from the last available quarter, 12-month-trailing, YTD or all data based upon date of first aggregation with Oranj.

ABOUT ORANJ

Oranj simplifies advisor technology without sacrificing sophistication or increasing costs, helping financial advisors spend less time managing and more time advising clients. The single platform streamlines portfolio management and client service, and provides advisors with rebalancing/trading, client/prospect management, portfolio management, and a client portal. For more information about Oranj and its free to low-cost wealth management platform, visit www.runoranj.com, connect with them on LinkedIn, or follow @runoranjdotcom on Twitter.

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