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Eager to improve the advisor-client relationship, a \$3 billion Atlanta-based RIA and turnkey asset management program will use the portfolio stress-testing and risk analytics of HiddenLevers, incorporated within the premier wealthtech platform of Orion Advisor Solutions.

In just a matter of weeks after Orion announced its acquisition of HiddenLevers, the new affiliate -- Cardea Capital or CC -- signed on as the first new post-acquisition user of both firm's technologies.

"At first CC wanted help with risk analysis on international holdings and due diligence tools for their investment committee. But hearing CC's leadership talk about their bigger ambitions, it was a really good fit for our interactive recommendation construction and proposal generation," said Clark Jeffries, Business Development lead for HiddenLevers on the deal.

Already using Orion as the core of their firm's technology systems, CC plans to use HiddenLevers to augment their own TAMP offering, improve their portfolio management capabilities, and engage clients with interactive portfolio analysis and real-time stress-testing.

"We are partnering with HiddenLevers to create an enhanced tech stack that efficiently manages a client's risk through the stages of their life, and through the stages of the macro economy," said Rob Schmidt, National Consulting Director at CC. "With the resurging market volatility and regulatory changes, leveraging Orion and HiddenLevers allows us to enhance the investment experience and provide greater customization to our investment advice."

Through their use of Orion, CC has already seen the benefits of efficiency and an improved client experience that comes when advisor technology follows and reinforces every step of an advisor's work. HiddenLevers proved to be a natural choice as CC sought to showcase their fiduciary services and connect even more deeply with their clients' priorities and financial goals.

Next-level client experience and risk insights

While Orion continues to integrate the risk analytics and business intelligence powers of HiddenLevers into its platform, CC does not have to wait to find immediate, practical use cases for HiddenLevers. For the home office, HiddenLevers makes it easy to curate an interactive TAMP blended with the CC product shelf. Outside portfolio managers will use

HiddenLevers' allocator workflow to make allocation and trading execution simple within Orion.

Affiliated advisors now have access to interactive portfolio analysis, real-time stress testing with a continually updated library of economic scenarios, and HiddenLevers' industry-leading investment proposals. The newest example scenarios include:

- **U.S. Reflation:** A deep dive into current inflation indicators, the extent to which they present a lasting economic threat, and potential upsides, whether the U.S. is headed toward a "Roaring '20s" or a "Stagnant '70s."
- **NASDAQ Moonshot:** An examination of the rotation from growth to value stocks, potential pain from future tech valuations, and whether the "COVID playbook" of investing still applies.

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"There is hardly a better way for advisors to explain their models than against the visual macro backdrop offered by HiddenLevers," said Eric Clarke, Founder and CEO of Orion. "The interactive storytelling and sound risk model let advisors show clients the good, bad, and ugly futures right alongside each other, and the potential impacts of each on their investments. This is how it's done at the highest levels of private wealth management, and now that includes CC."

<https://www.thewealthadvisor.com/article/orions-hiddenlevers-brings-new-3-billion-deployment>