



ORION CLIENT PORTAL ([HTTPS://PORTAL.ORIONADVISOR.COM/](https://portal.orionadvisor.com/))

## Strong Relationships. Goal-focused Solutions. Exceptional Service.

Our passion is serving you with a customized solution that  
matches  
investment advisory best practices with your goals.

As a fiduciary, we serve your best interest for wealth  
management  
and financial planning. We are a fee-only investment advisor  
firm.

"Our clients are at the  
center of everything we do.  
It's beyond a job, beyond a  
profession, it's a sense of  
calling."





(<https://www.youtube.com/watch?v=8z1Ozgm7tWI>)

## Investment Insights

### Latest Stories

Preparing (<https://thebamalliance.com/blog/preparing-for-parenting-staring-down-the-financial-precipice/>)

Staring  
Down the  
Financial  
Precipice

Adding a  
family  
member is  
an exciting  
time.

Decorating  
the nursery,  
picking out  
names,  
going to  
baby  
showers,  
and  
attending  
parenting

classes all  
prepare you  
for your  
baby's  
arrival  
home. But  
with ...

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Life 2.0 (<https://thebamalliance.com/blog/life-2-0/>)

Most of us  
have caught  
ourselves day  
dreaming  
about what  
could be  
someday. I  
see this  
happen a lot  
with clients  
in their 50s,  
but it can  
also happen  
earlier. I'm a  
good  
example of  
Life 2.0. I  
start...

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Your Home Is a Personal Asset (<https://thebamalliance.com/blog/your-home-is-a-personal-asset/>)

a  
Personal  
Asset  
Your  
home is  
your  
sanctuary.  
It is your  
comfort  
zone and

where  
you spend  
a good  
deal of  
your time.  
You sleep,  
cook, eat  
and  
entertain  
at home.  
For some,  
you may  
even work  
from  
home. It  
is no  
surp...

(<https://feedgrabbr.com>)

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