

## Differentiate your firm and offering with modern, commission-free annuity and insurance solutions.

Deliver greater client value and grow AUM with Orion + DPL.

As clients have come to expect more holistic and personalized advice, annuities and insurance are critical tools in a fiduciary advisor's toolkit. Now, it's easy to discover, fulfill, manage, and report on a wide range of solutions directly from your Orion Advisor Technology platform.

### Fiduciary-Friendly Annuities

With scores of products from leading carriers, DPL's no-load annuity marketplace enables you to expand your offering with modern, low-cost solutions for guaranteed income, principal protection, accumulation, and more.

### Best-in-Class Insurance

Insurance, including life, disability, and long-term care, can help address a range of clients' needs. DPL provides best-in-class products and expertise so you can use insurance strategically in clients' financial plans.

### Product Insights

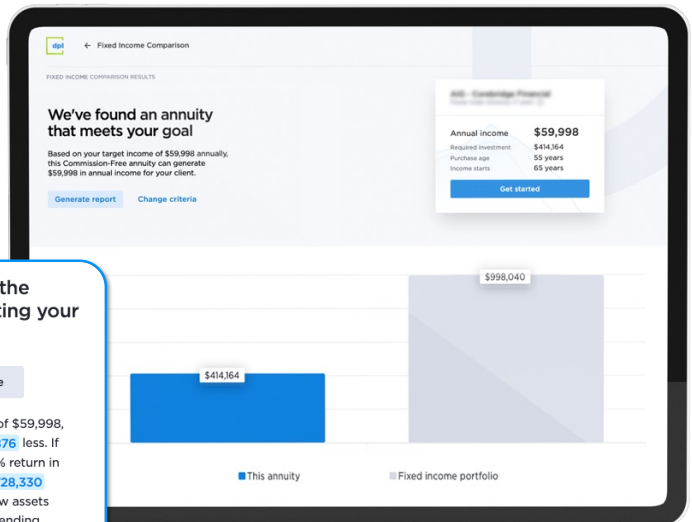
DPL's suite of Product Discovery Tools and team of insurance-licensed consultants make it easy to explore and compare products, have productive conversations with clients, and deliver fiduciary solutions to meet needs in the financial plan.

### Integration with Orion Advisor Technology

Using single sign-on from Orion, you can seamlessly access DPL's marketplace, tools, and technology. Robust data feeds from DPL to Orion provide position and transaction data, and enable management of annuity assets within your Orion desktop.

### Breakaway Accelerator Program

Advisors looking to go independent often are tethered to a broker-dealer by their annuity book of business. With DPL, advisors can turn clients' existing annuities into fee-based revenue and provide insurance solutions and technology that align with their new fiduciary business model and holistic planning process.



Now, let's look at the impact of reinvesting your surplus

Client value Firm value

To meet your income need of \$59,998, the annuity required **\$583,876** less. If we invest the surplus at a 6% return in the market, it results in **\$3,728,330** that represents potential new assets for growth, discretionary spending and legacy.

Output from DPL's Fixed Income Comparison Tool.

Want to learn more? Reach out to your Orion relationship manager or email us at [orion@dplfp.com](mailto:orion@dplfp.com).