



CASE STUDY



# Empowering Breakaway Advisors to Define Their Future

## Engage Wealth Group, LLC

### Year Founded:

2020

### Headquarters:

Northfield, Illinois

### Profile:

Engage Wealth Group, LLC, was founded on the philosophy that financial planning and portfolio management should be a fully transparent, collaborative, long-term relationship. As a fee-only financial advisory firm, Engage Wealth is proud to be a true fiduciary, delivering recommendations in investors' best interests, unconflicted by commissions and incentives.

## Choosing a Tech Partner

Ed Gjertsen, II, founder of Engage Wealth Group, LLC, is no newcomer to the financial industry. In fact, he's a veritable veteran, with over 25 years of experience as a CFP. From 2009 – 2012, Gjertsen served on the Financial Planning Association's National Board of Directors, and as National President of the organization from 2015 - 2016.

In short: Gjertsen knows what he's talking about.

And when he began looking for a tech partner to support his shift to independence after 27 years with the same firm, he knew to look at Orion.

"As a state RIA, I knew where I needed to be in the future. And knowing Orion and knowing the platform well, I knew where I had to go. In order for me to start a high-performing firm, Orion was one of the easiest choices I've made in this whole process."

From his long tenure in the industry, Gjertsen was familiar with Orion. Of course, he did his due diligence and looked around at other tech partners. But when he considered leading development, leading tech, and ultimately, what most high-performing firms are using?

**"It's Orion."**

Since 2016, over 220 breakaway firms have chosen Orion as their partner on the road to independence.\*

*\*as of August 13, 2020*

## A Brand New Relationship

From the very beginning—in fact, as soon as he read his literal contract—Gjertsen felt like part of a community.

“It sounds simple, but the language and the overall approach of the contract made me feel like this was different. This relationship was different. And from the onset, every interaction has proven that.”

Gjertsen is quick to point out that he isn’t a sunshine and rainbows kind of guy.

“I don’t say things lightly, and if things don’t work well, I’ll let you know. But if things do work well, I’ll also let you know. And the way Orion onboards advisors? It’s brilliant.”

Gjertsen explains that because he’s the sole practitioner at his firm, it’s up to him and only him to master the entire Orion platform.

“I appreciate the methodical process, because it’s a very robust platform, and there’s a lot to go through. It hasn’t been overwhelming for me, and that’s key. It’s very refined.”

There’s a lot to learn, Gjertsen says.

“I’m not going to remember every detail from every onboarding call. But the support teams at Orion have been incredibly helpful and responsive. They’ve really reinforced the decision I’ve made.”



They've done a brilliant job of not only building this platform, but continuing to improve it. I can see how they've pivoted in different areas, and that they understand exactly where they're going.

## Looking Forward to the Future

As the founder of his new firm, Gjertsen finds himself in the unique position of being able to start from scratch.

"I'm focusing on becoming more efficient in terms of process," he explains. "Over time, I want to systematize a number of the operational tasks within the firm that take up an inordinate amount of time from a personnel standpoint. If I can establish those efficiencies, I don't have to develop a burgeoning staff to meet the needs of the back office."

### For example:

Previously, Gjertsen needed at least a day to tackle quarterly and annual SEC numbers, between gathering them from different databases and rolling them into an Excel spreadsheet.

### Now?

"They're literally right there on my dashboard. I just have to write them down."

Gjertsen also recognizes the value of Orion's multi-custodial relationships, which would allow him to expand should he ever choose to do so. And as the industry continues to evolve, with major mergers like TD Ameritrade and Schwab on the horizon, Orion's consistent innovation inspires confidence in Gjertsen.

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## Contact Us



Ready to see how easy it is to get started with Orion?  
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