SUMMIT
AN ORION COMPANY

Humanizing Wealth

TRUEPOINT AND SUMMIT PUT CLIENTS AT THE CENTER

"YOUR MONEY SIMPLIFIED, SO YOU MAY SIMPLY LIVE."
THAT'S THE TRUEPOINT WAY.

For 35 years, Truepoint Wealth Counsel, an employee-owned Cincinnati-based wealth management firm, has lived by the Truepoint Way. They're genuinely curious about their clients, they ask the right questions, and they truly listen. But bringing all the pieces together to simplify their clients' financial lives demanded a technology solution as integrated as their approach.

That's when they discovered Orion's Summit platform.

THE CHALLENGE:

The Disconnect Between Holistic Advice and Client Experience

Truepoint's commitment to integrated services is a powerful differentiator in the fee-only market. Their team — experts in investment, tax, estate planning, and financial planning — works collaboratively, sharing information and delivering advice in a unified way. "These areas aren't siloed off at our company," said Truepoint's Chief Infrastructure Officer Scott Keller. "All of these teams come together to discuss our clients, share information, and deliver advice in an integrated way."

However, this integrated approach wasn't fully reflected in the client experience. Their existing technology, including a custom-built client portal, presented two key challenges:

1. **Technology Gap:** While Truepoint's internal teams were integrated, their client-facing technology didn't fully showcase this holistic approach. Their portfolio management system included a client portal that was primarily investment-centric, focusing on performance and holdings. It lacked the ability to bring together the other crucial elements of their client's financial life — tax information, estate plans, and financial goals — into a single, unified view.

2. **Innovation Bottleneck:** To close the client experience gap, Truepoint had invested in building a homegrown client portal but recognized the challenge of long-term maintenance. "I was concerned about our ability to maintain and continue to innovate with that portal," said Keller. "It took us a long time to build what we had. And I was struggling to imagine how we would continue to iterate on that."

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THE OBJECTIVE:

Humanizing the Wealth Management Experience

Truepoint's objective was to create a client experience that truly reflected their integrated approach and humanized the wealth management process. They wanted a platform that would:

- **Provide a Holistic Client View:** A single, unified platform where clients can see all aspects of their financial life — investments, taxes, estate plans, financial goals — in one place.
- **Enhance Client Engagement:** A more interactive and personalized experience that would strengthen client relationships and make complex financial information more accessible.
- **Streamline Advisor Workflows:** Improve efficiency and provide advisors more time to focus on building relationships and delivering personalized guidance.

THE SOLUTION:

Summit's Client-Centric Vision

Seeking a more robust and scalable platform for future growth, the Truepoint team found their solution in Summit. "We didn't think it existed. And then Summit appeared and had everything all together in one place," said Keller.

Summit's portfolio accounting, data integration, client-facing tools, and unique ability to connect with Truepoint's flexible client database made all the difference. "What's most impressive," said Keller, "is how quickly they were able to plug in and orient to our database that stores all the information on our clients about their estate plan, life plan, or tax data.

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"They've shown that they understand all of that data," he added. "And they're completely open to building and designing whatever interface we ask for to bring it to life in the portal."

This holistic approach extends to portfolio management, where Truepoint utilizes Orion's trading tool alongside the Summit platform—both part of Orion's suite of solutions—to deliver a seamless and comprehensive PMS experience for advisors.

Beyond the technology, the collaborative and responsive approach from the Summit team has been essential. "It's been unbelievable," Keller emphasized. "We love their team... we've been meeting with the team at Summit twice a week for nearly five months. Their responsiveness has been remarkable."

Summit's focus on humanizing wealth management resonated deeply with Truepoint. "It just doesn't make sense to spend time talking with clients about their lives, goals, estate plans, taxes, and then give them a portal that only shows investment performance," said Keller. "Summit understands that. They're bringing all those crucial elements to life, showing clients the whole picture of their financial well-being — not just the investment piece. And it goes even further than that. They're helping us visualize our clients' futures, showing them how their finances can help them achieve their long-term aspirations. That's incredibly valuable."

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THE RESULTS:

Bringing the Vision to Life

TIME SAVED

By abandoning their custom portal project, Truepoint reclaimed significant development resources, allowing their team to focus on higher-value activities.

IMPROVED CLIENT EXPERIENCE

Summit’s platform will enable Truepoint to better visualize and integrate the various aspects of their clients’ financial lives beyond just investment performance. This will enhance Truepoint’s ability to deliver holistic advice and strengthen client relationships

INCREASED ADVISOR EFFICIENCY

The integrated platform promises to streamline workflows for Truepoint’s advisors, allowing them to spend more time with clients and less time on administrative tasks.

THE FUTURE:

The Next Chapter of Innovation

Truepoint’s partnership with Summit represents a significant step forward in their mission to provide truly integrated wealth management services. By leveraging Summit’s technology and collaborative approach, Truepoint is providing a platform that simplifies complex financial information and fosters deeper client engagement and collaboration.

This commitment to client empowerment will continue to drive Truepoint’s success. Truepoint leverages the Summit platform for their enhanced client portal featuring interactive financial planning tools and real-time tax data for proactive insights.

This continued collaboration with Summit will enable Truepoint to provide even more personalized advice, solidifying its position as a leader in integrated wealth management and further empowering clients to take control of their financial futures.