

XYIS OFFICE HOURS SUMMARY

August 10, 2022

Technology Updates & Tips

RightCapital & Orion

Changes are coming soon to improve the RightCapital & Orion integration! It is expected that the updates will provide a more robust data integration that will increase efficiency for RightCapital users. Stay tuned for more details in the coming weeks.

Risk Tolerance Questionnaire

The Risk Tolerance Questionnaire in the Advisor Portal got a refresh! Check it out in [this video](#) posted in the [XYIS Knowledge Base](#).

Helpful Tech Tips

Orion recently announced that they will be pushing software updates through weekly instead monthly moving forward. In addition to platform improvements coming through more often, you may experience the occasional hiccup in Orion more frequently than before.

If you should experience any “glitchy” behavior in Orion, we recommend that you clear your browser cache and then try again. Orion works best in Chrome, so try that as well if you are not already. [This article](#) walks you through clearing your cache in Chrome if you are not familiar with how to do so.

Pricing Update

Historically, XYIS discounted the personal accounts for members to 10 BPS down from the standard fee schedule. The intended purpose was to allow advisors to try XYIS themselves before bringing on clients. Over time we have seen that the discount is not fulfilling its original intent. More importantly, we want to deliver benefits and resources to our advisors that ultimately improve the experience of our end clients and puts them first.

The discount is discontinued effective immediately for advisors whose personal accounts are not already on the platform. For advisors whose personal accounts are receiving the discount, they will continue to receive it through **December 31, 2022**.

- If you bill in *advance*, your October 2022 Q4 invoice will include the discount. Your January 2023 Q1 invoice will revert to standard pricing for all accounts.
- If you bill in *arrears*, your January 2023 Q4 invoice will include the discount. Your April 2023 Q1 invoice will revert to standard pricing for all accounts.

#XYPNLIVE 2022

We are planning a meet-up for XYIS Advisors at [#XYPNLIVE 2022](#)! We look forward to meeting you in person. Keep an eye out for an invitation coming your way in September.

If you have not yet purchased your pass for the conference, you can do that [here](#). **See you in Denver!**