



ORANJ

An Open Letter to Independent Advisors from Oranj CEO David Lyon



Let's talk about the future
of financial services.

Send me your thoughts
and opinions:



david@runoranj.com



(312) 219-3750



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I hope that you share in the excitement with me about the announcement from some of the industry's leading custodians eliminating commissions on ETF transactions. Many retail wirehouse providers made the move to free trading over a year ago, so it was good to see a number of institutional custodians following suit.

It has been an amazing decade to be an advisor and an investor. We know there are going to be challenging times ahead in the market which are going to lower independent advisors profitability and create new client service challenges. However, we are experiencing challenging times right now - technology is getting more expensive, adhering to regulations and compliance requirements is increasing the cost of being independent, the list goes on...

Our industry has come a long way but still has a long way to go. It is becoming increasingly difficult for advisors to maintain their independence and entrepreneurial spirit. We have seen RIA aggregator firms emerge. We've seen custodians begin to provide services that are more representative of a Broker-Dealer. The lines between fiduciary, service and technology providers have never been more blurred.

We believe deeply in the value that advisors provide and are particularly passionate about independent advisors, as Oranj's roots were born out of a Registered Investment Advisory firm. We love independent advisors because they provide a higher level of service, deeper personal relationships and customized solutions that cannot be found at the larger "big box" institutions.

The independent rebellious spirit runs deep at Oranj and we work tirelessly to help empower and support your mission - to provide investors with unbiased financial advice and management.

At Oranj, our mission is to help advisors find and maintain independence. We need more businesses within the industry that believe in creating solutions that challenge the status quo and help advisors spend less time managing and more time advising. It isn't enough to just build modern technology, we must accompany innovative software with new business models that help advisors manage their practice, provide better outcomes for their clients and improve their bottom line.

Every advisor has a voice and we want to hear yours! Just as you are in a relationship business, so are all the businesses that support you. Oranj is asking you to reach out and tell us your biggest pain points so we can better understand how we can continue to be part of the solution.

Join me and the team at Oranj in our mission to help advisors find and maintain their independence! Text me at **312-219-3750** or email me at David@runoranj.com and share the industry changes you need to see in order to better serve your clients and run a better business.

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