

*ORION Client Portal Overview

Welcome to your financial portal!

This guide walks through the portal's features and provides tips on how to get the most out of the online experience.

Accessing Your Account

Navigate to the website address that your advisor provided you. If you know your credentials: Enter your Username > click Continue > enter your Password > click Log In.

Two-Factor Authentication (2FA) is mandatory when logging into the client portal. Review the [Two/Multi-Factor Authentication Overview](#) for more information and additional instructions.

Create Login

If this is your first time logging in and you were instructed to create your login, click **Create Login** in the bottom left corner of the login page. On the following prompt:

- Enter your email address as your username
- Input required personal information in the additional fields
- Select the I'm not a robot box, and click Create Login
- An email to create a password will be sent to the email we have on file for your household. If you do not see this email, contact your advisor.

Create Password

Click the link in the email to set your password. Please note, this link is temporary and expires after a short time.

- After clicking the link, enter a new password. Password requirements are listed on this page.
- Confirm the password by repeating it in the second field, and click Reset Password.
- Then, proceed with logging in using your new password.

Reset Your Password

On the login page, enter your Username and click Continue. On the next page click **Forgot password?** in the bottom left corner. On the next prompt, enter your Username and click **Reset Password**. An email is sent to the email address that is associated with your household.

Then, follow the instructions above in the Create Password section of this document.

The screenshot shows the 'Login' page. At the top, the word 'Login' is displayed. Below it is a text input field labeled 'Username or Email'. Underneath the field is a large blue button labeled 'Continue'. In the bottom left corner, there is a link labeled 'Create Login'.

The screenshot shows the 'Create Login' page. It features several input fields: 'User Name', 'Social Security Number (xxx xx xxxx)', 'Client' (a dropdown menu), and 'Date of Birth'. Below these fields is a reCAPTCHA section with an 'I'm not a robot' checkbox and a reCAPTCHA logo. At the bottom, there is a large blue button labeled 'Create Login' and a link labeled 'Go back to Login'.

The screenshot shows the 'Reset Password' page. At the top left, there is a link labeled '← Back to Login'. The main heading is 'Reset Password'. Below the heading, there is a text prompt: 'Enter your username or email and we'll send you instructions to reset your password.' This is followed by a text input field labeled 'Username or email'. At the bottom, there is a large blue button labeled 'Reset Password'. In the footer, there is a link: 'Still having trouble logging in? Please reach out to your administrator.'

*ORION Personal Finances Overview

Personal Finances Summary

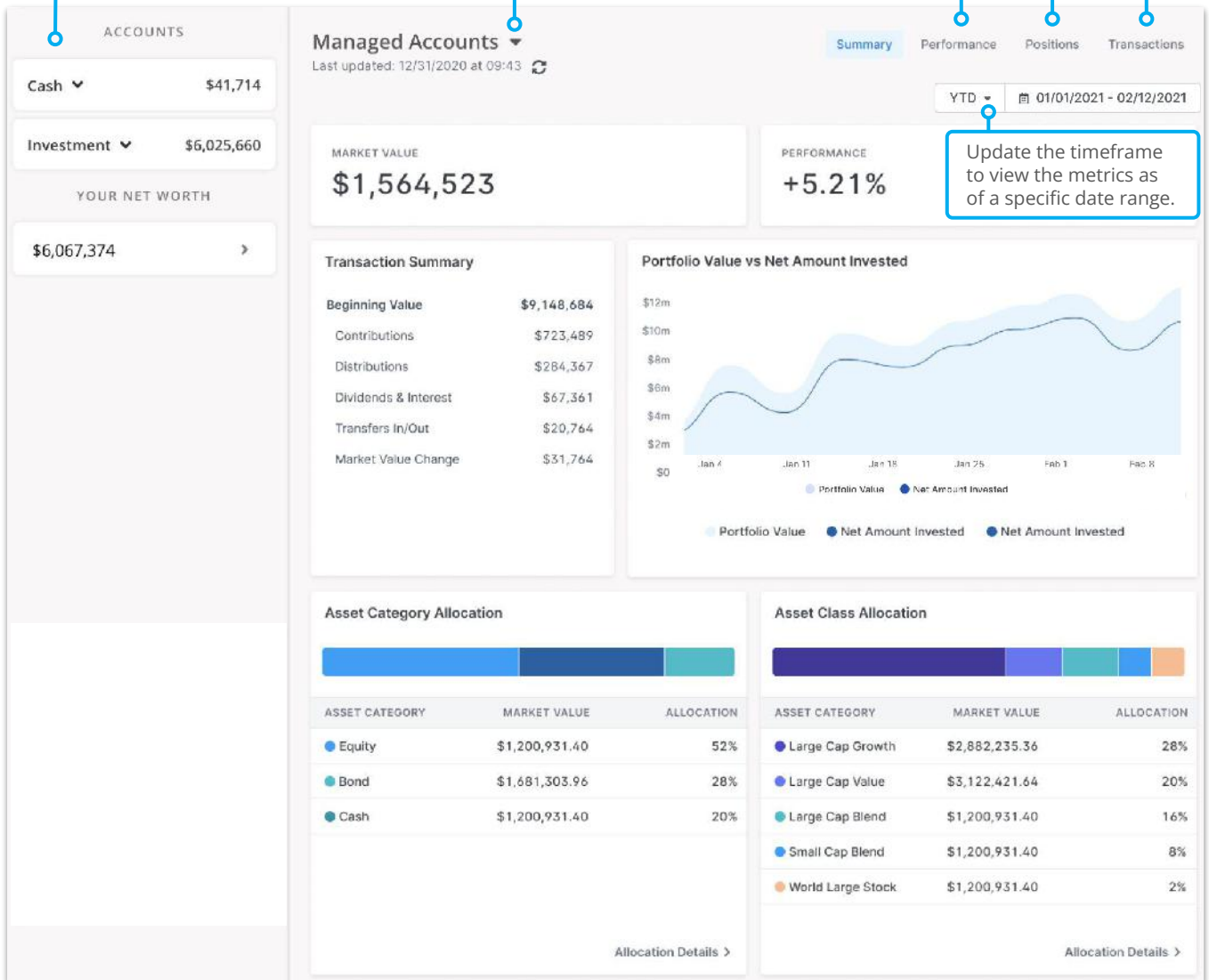
Dive deeper to further understand what you have and how it's performing. Check out information for various time frames including your returns, market value, and allocations.

Click on an account type to see a list of your associated accounts. Clicking on an account will open that account's transaction history.

By default, the metrics are based on all of your managed accounts. Click on the dropdown to view information for a specific account.

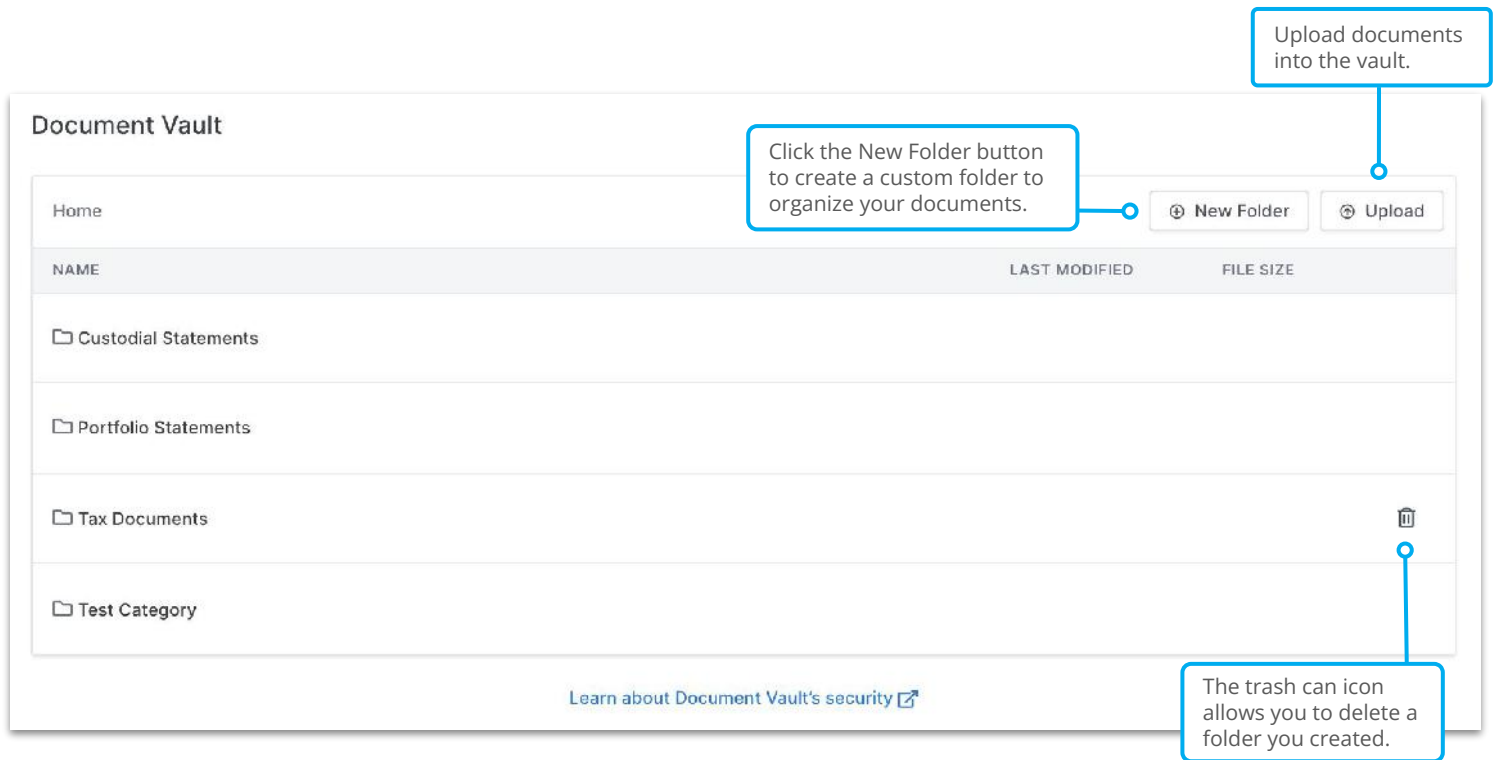
Click on the tabs to view more details on the holdings in your account(s).


Update the timeframe to view the metrics as of a specific date range.



Document Vault

Store and share documents securely with your advisor in the Document Vault. Files that are uploaded into the vault are encrypted in transit, and at rest, in order to provide end-to-end security and protection. Many users upload tax statements, wills, insurance policies, and more for safe keeping. This is also where your advisor might share important documents with you like your portfolio statements.



The screenshot shows the Document Vault interface. At the top left is a 'Home' link. Below it is a table with columns for 'NAME', 'LAST MODIFIED', and 'FILE SIZE'. The table lists four folders: 'Custodial Statements', 'Portfolio Statements', 'Tax Documents', and 'Test Category'. To the right of the table are two buttons: 'New Folder' and 'Upload'. A trash can icon is located to the right of the 'Tax Documents' folder. At the bottom of the interface is a link: 'Learn about Document Vault's security '. Three callout boxes provide instructions: one for the 'New Folder' button, one for the 'Upload' button, and one for the trash can icon.






Document Vault


Home

Click the New Folder button to create a custom folder to organize your documents.

New Folder Upload

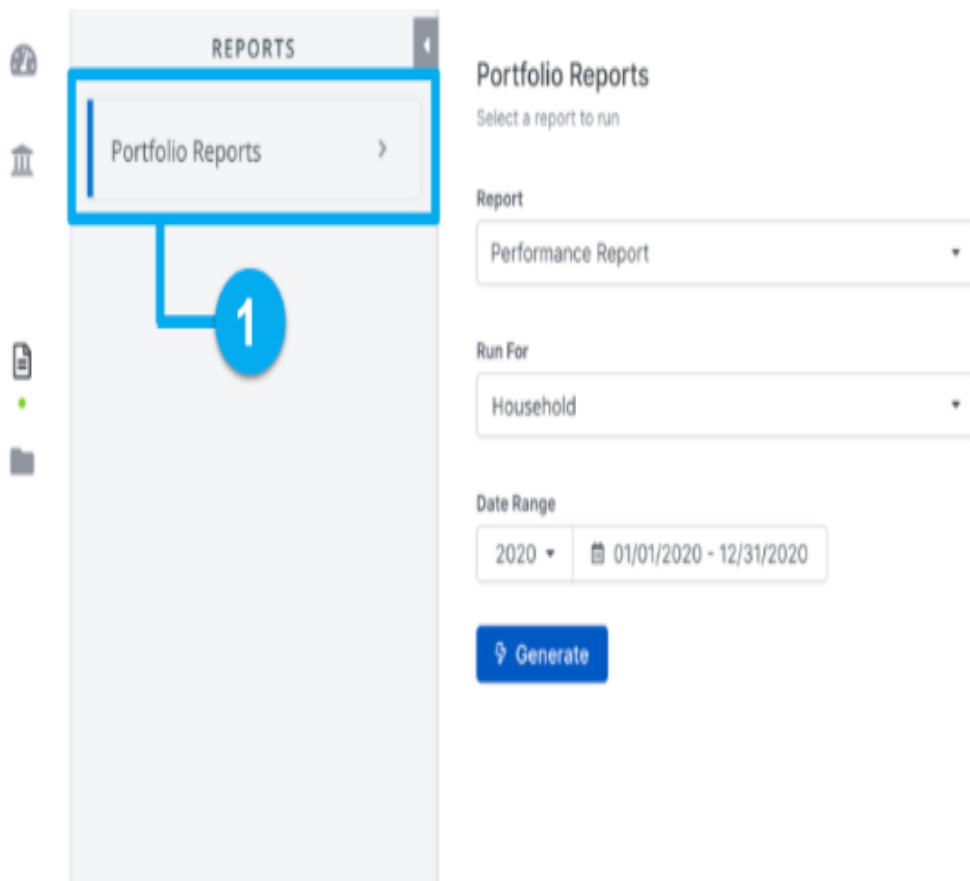
Upload documents into the vault.

NAME	LAST MODIFIED	FILE SIZE
 Custodial Statements		
 Portfolio Statements		
 Tax Documents		
 Test Category		

Learn about Document Vault's security 

The trash can icon allows you to delete a folder you created.

View Your Customized Reports



Never miss a beat on milestones, account updates, or alerts. You'll receive email and text communications on dozens of events—like trades, distributions, and model changes.

Stay In-The-Know On-The-Go



Event-Based Notifications

