ORION Client Portal Overview

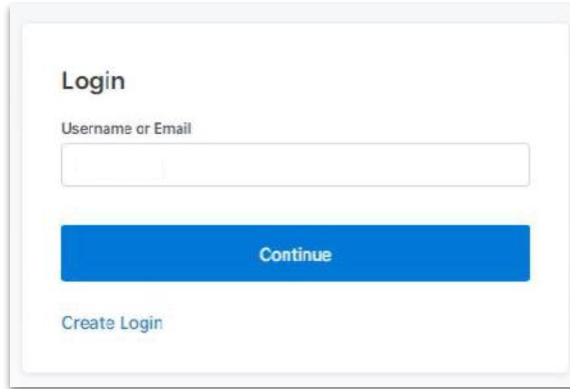
Welcome to your financial portal!

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.

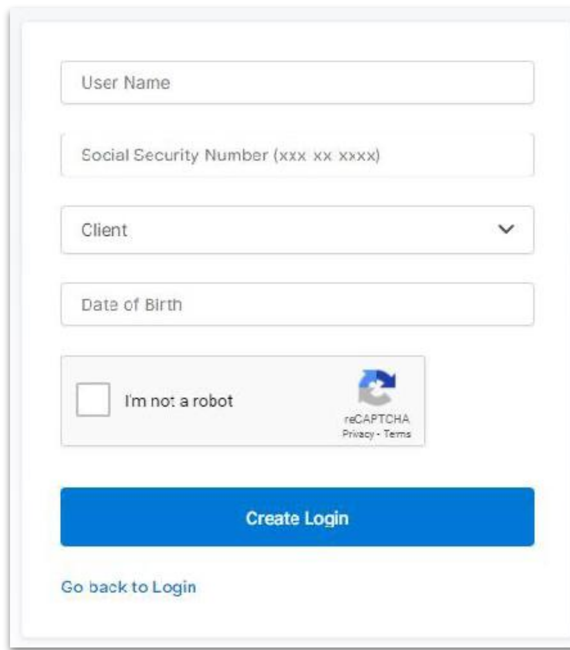
Two-Factor Authentication (2FA) is mandatory when logging into the client portal. Review the **Two/Multi-Factor Authentication Overview** for more information and additional instructions.



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

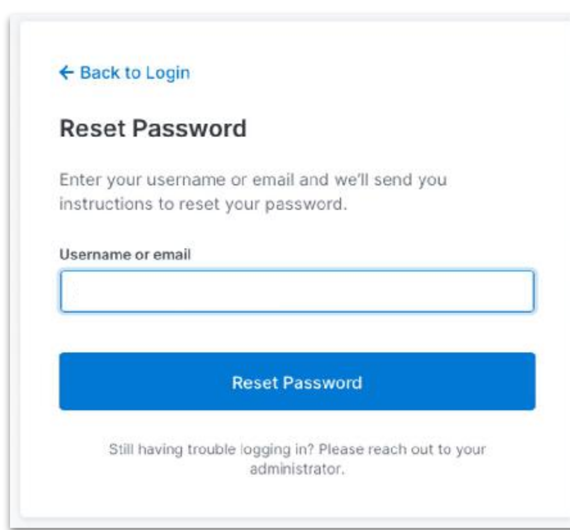
Click the link in the email to set your password. Please note, this link is temporary and expires after a short time.

- 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.

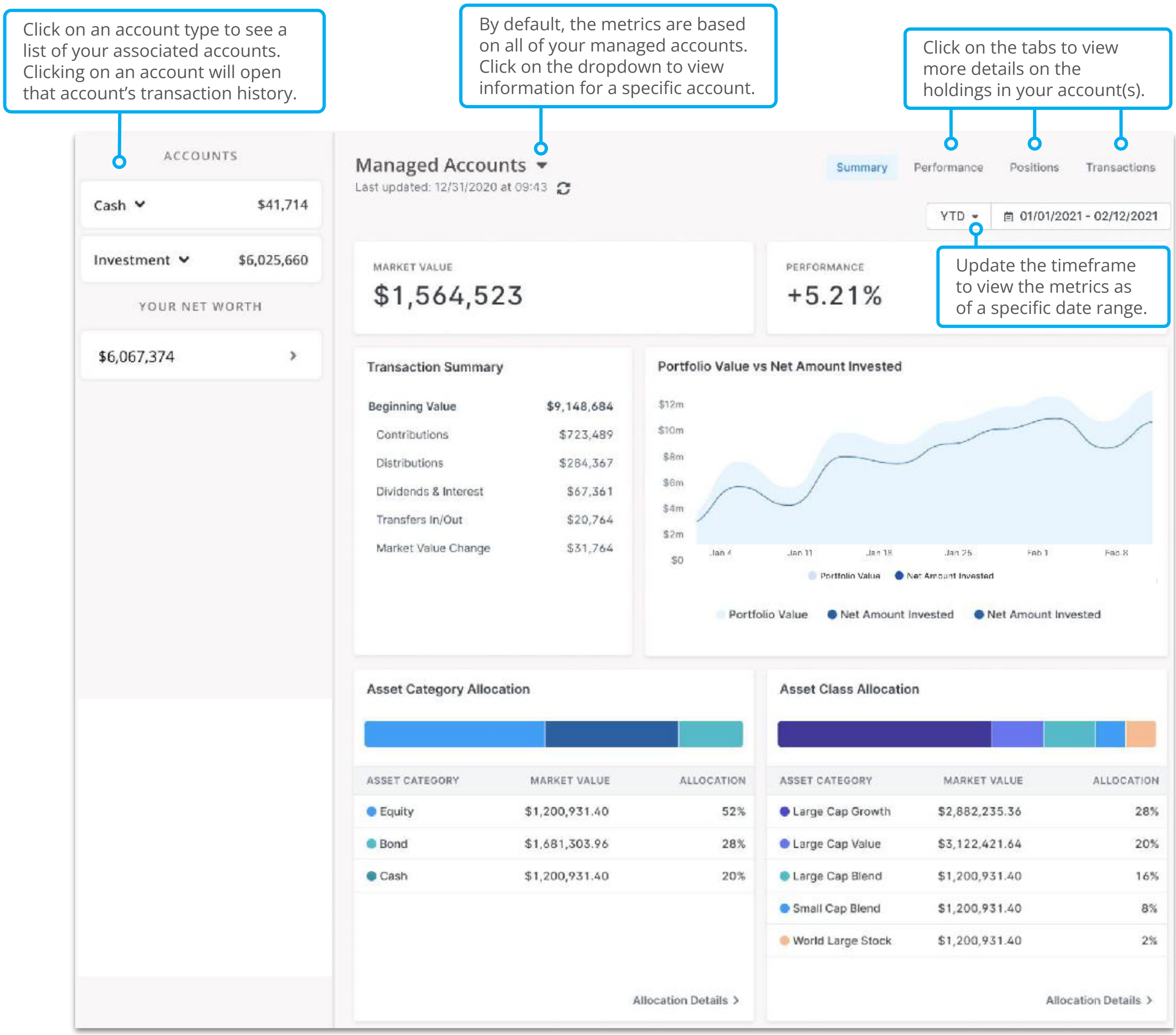
Then, follow the instructions above in the Create Password section of this document.



ORION Personal Finances Overview

Personal Finances Summary

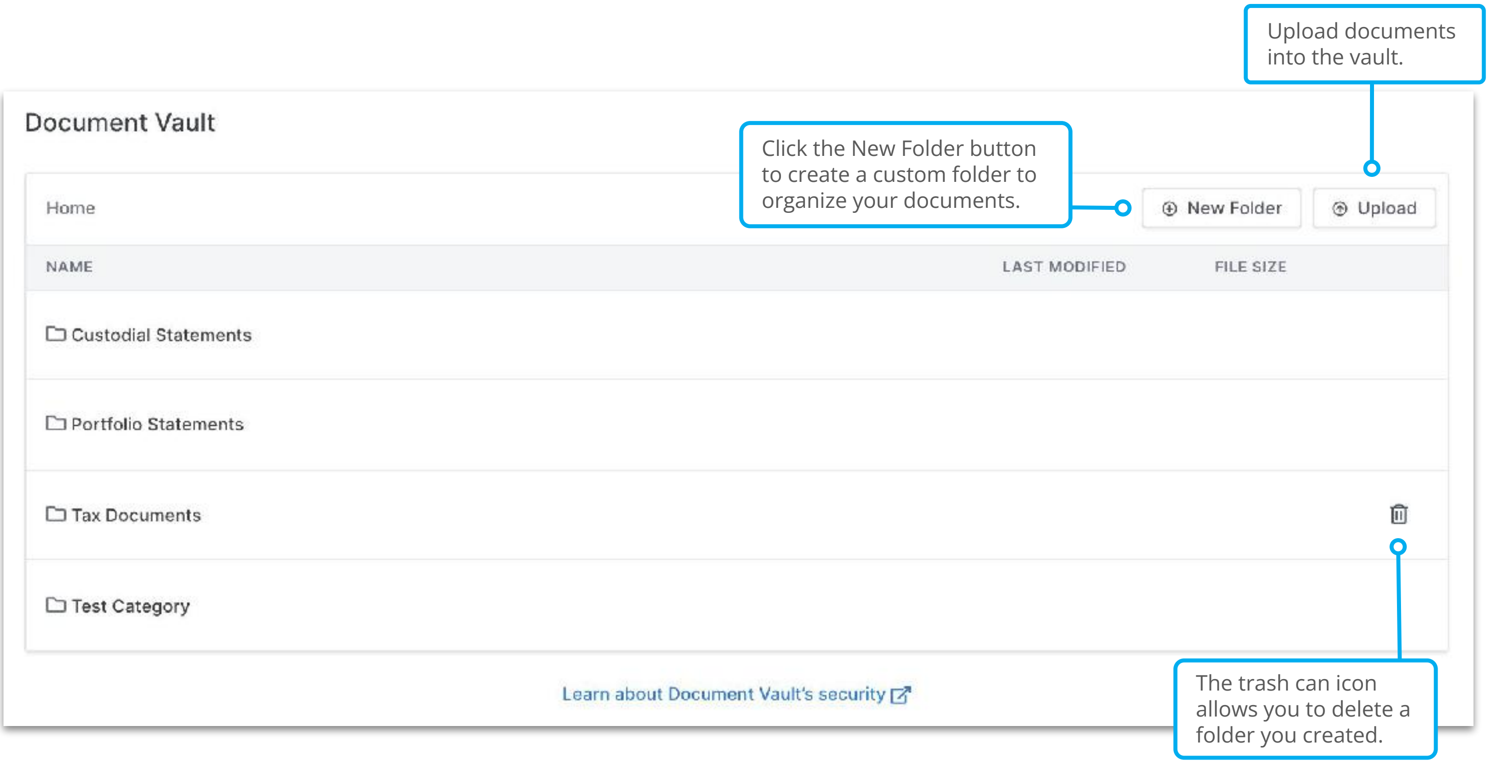
Dive deeper to further understand what you have and how it's performing. Check out information for various time frames including your returns, market value, and allocations.



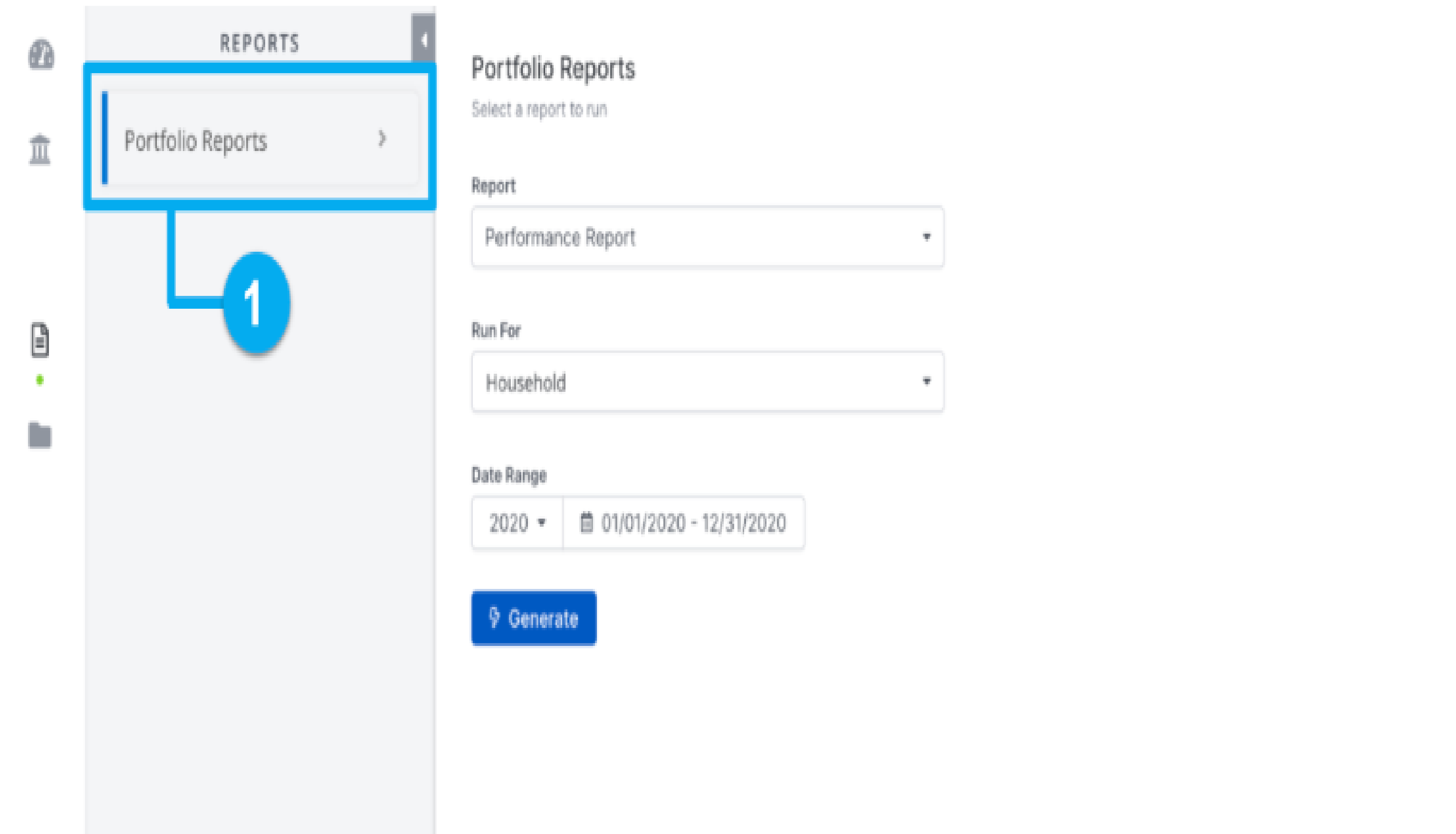
ORION Document Vault

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.



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