

Financial Portal Overview



Welcome to your Orion Financial Portal! This portal contains your financial plans, investments performance, important documents, market news and advisor communications - all in one place. The Orion Financial Portal helps you to understand your entire financial picture and puts your financial advisor just one click away for guidance and help.

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

Accessing Your Account

Navigate to portfoliologin.com. If you know your credentials, enter your Username and Password and click Sign In.

Create Login

If this is your first time logging in, click Create Login in the bottom right 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, click **Forgot password?** in the bottom left corner. On the next prompt, enter your Username and click Send Me Instructions. 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 Orion login page. At the top is the Orion logo. Below it are two input fields: 'Username' and 'Password'. The 'Password' field has an eye icon to toggle visibility. Below the fields is a checkbox labeled 'Remember My Device'. A large blue button labeled 'Sign In' is centered below the checkbox. At the bottom left is a link 'Forgot password?' and at the bottom right is a link 'Create Login'.

The screenshot shows the Orion 'Create Login' page. It has three input fields: 'Username', 'Social Security Number (xxx-xx-xxxx)', and 'Date of Birth (mm/dd/yyyy)'. Below these is a reCAPTCHA widget with an 'I'm not a robot' checkbox and a 'Reset reCAPTCHA' link. A large blue button labeled 'Create Login' is centered below the reCAPTCHA. At the bottom is a link 'Try logging in again'.

The screenshot shows the Orion password strength page. At the top is a password input field with an eye icon. Below it is a progress bar and the text 'Password Strength: Very Strong'. A list of requirements is shown with green checkmarks: 'Uppercase and lowercase letter', 'Number or Special Character', '10 or more characters', 'Does not contain date related words', 'No variation of 'password', 'Orion', or 'advisor'', and 'Does not use your User ID'. Below the list is a second password input field with a green checkmark icon. A large blue button labeled 'Reset Password' is centered at the bottom.

Client Overview

Client Overview

Quickly and easily see some of the most important parts of your financial story, including your net worth, transactions and progress on your financial plan, along with an executive summary and news from your advisor.

Overview

Let's manage your new financial journey.

Financial Plan RETIRE AT 65

Retirement CURRENT RETIRE AT 65

Funds at Retirement Start: **\$17,567,924**

Use the arrows to view different goals within your financial plan.

Toggle between your proposed and current plan.

Evaluate details for your financial plan and goals.

Review recent updates or notes from your advisor.

Executive Summary

Hi Douglas. Recently we've made updates to your plan to include an early retirement and have also updated your retirement plans to include a slight decrease in spending. We appreciate your business as a valued client at Sample Financial and look forward to continuing to serve you and your family in the future!

Newsfeed

SEPTEMBER 2021

Orion Client Portal
September 30
Customize Your Own Client Facing Video!

2021 - 3rd Quarter Statement
September 30

July 2021 Release Notes
September 28
Document Vault Enhancements!

Along with the redesign of our Document Vault, users will now have the ability to drag and drop new files into the Document Vault. We've also increased the subfolder limits so users can now create up to 10 sub folders. This new design creates the needed architecture to add Fidelity statements to our vault later this summer.

Click Here See All the New July Enhancements

Keep up-to-date with newsfeed posts your advisor shares with you!

Review a breakdown of the assets and liabilities that are contributing to your net worth.

Check your recent transaction history from spending accounts linked in the portal through Plaid. View individual transactions by account or category.

Client Overview

Client Overview

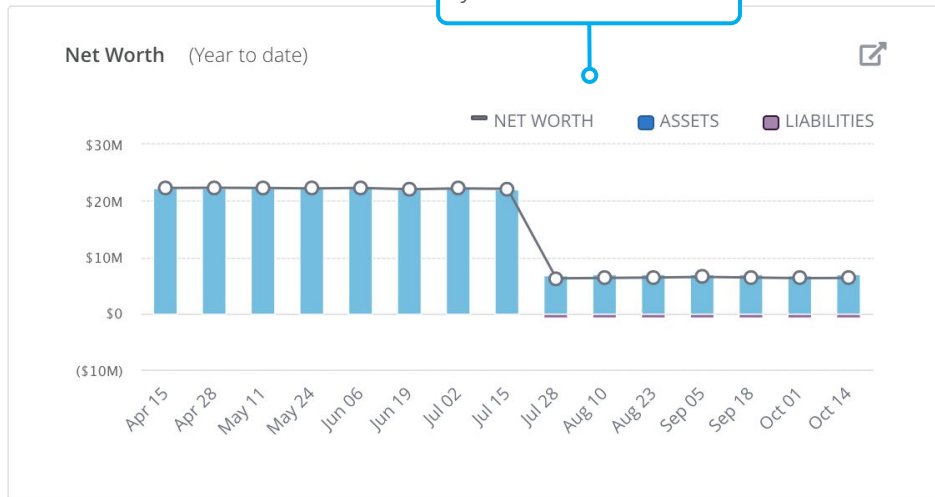
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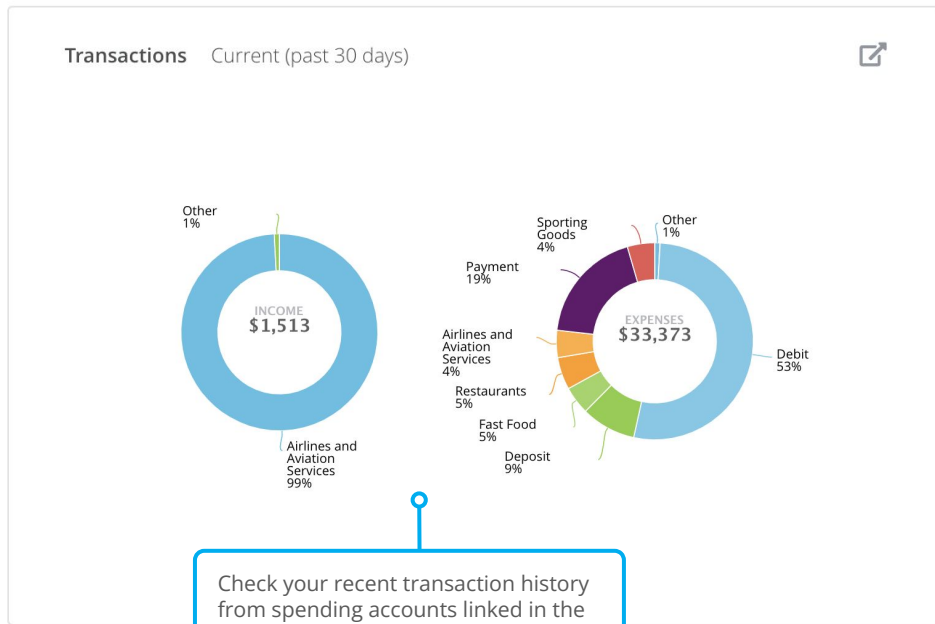
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[Hide Message](#)

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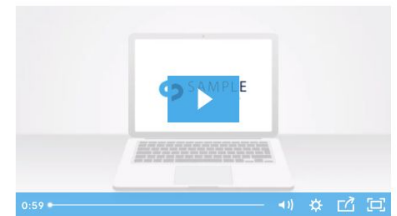
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SEPTEMBER 2021

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Customize Your Own Client Facing Video!



[Supporting Link](#)

2021 - 3rd Quarter Statement

September 30

[Supporting Link](#)

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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.

Link an account from an outside institution, or add an account manually to the portal.

The dashboard displays the following information:

- ACCOUNTS:** Cash (\$41,714), Investment (\$6,025,660), YOUR NET WORTH (\$6,067,374)
- Managed Accounts:** Last updated: 12/31/2020 at 09:43
- MARKET VALUE:** \$1,564,523
- PERFORMANCE:** +5.21%
- Transaction Summary:**

Beginning Value	\$9,148,684
Contributions	\$723,489
Distributions	\$284,367
Dividends & Interest	\$67,361
Transfers In/Out	\$20,764
Market Value Change	\$31,764
- Portfolio Value vs Net Amount Invested:** Line chart showing Portfolio Value and Net Amount Invested from Jan 4 to Feb 8.
- Asset Category Allocation:**

ASSET CATEGORY	MARKET VALUE	ALLOCATION
Equity	\$1,200,931.40	52%
Bond	\$1,681,303.96	28%
Cash	\$1,200,931.40	20%
- Asset Class Allocation:**

ASSET CATEGORY	MARKET VALUE	ALLOCATION
Large Cap Growth	\$2,882,235.36	28%
Large Cap Value	\$3,122,421.64	20%
Large Cap Blend	\$1,200,931.40	16%
Small Cap Blend	\$1,200,931.40	8%
World Large Stock	\$1,200,931.40	2%

[Add Account](#)
[Link Management](#)
[Allocation Details >](#)



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 the title "Document Vault". Below it is a breadcrumb "Home". On the right side, there are two buttons: "New Folder" and "Upload". Below these buttons is a table with columns "NAME", "LAST MODIFIED", and "FILE SIZE". The table contains four rows representing folders: "Custodial Statements", "Portfolio Statements", "Tax Documents", and "Test Category". A trash can icon is located to the right of the "Tax Documents" row. At the bottom center, there is a link "Learn about Document Vault's security" with an external link icon. Three callout boxes provide instructions: one for the "New Folder" button, one for the "Upload" button, and one for the trash can icon.

Home

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

⊕ New Folder ⊕ Upload

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

[Learn about Document Vault's security](#)

Upload documents into the vault.

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