For further assistance please contact Orion at 800-379-2513

Financial Portal Overview

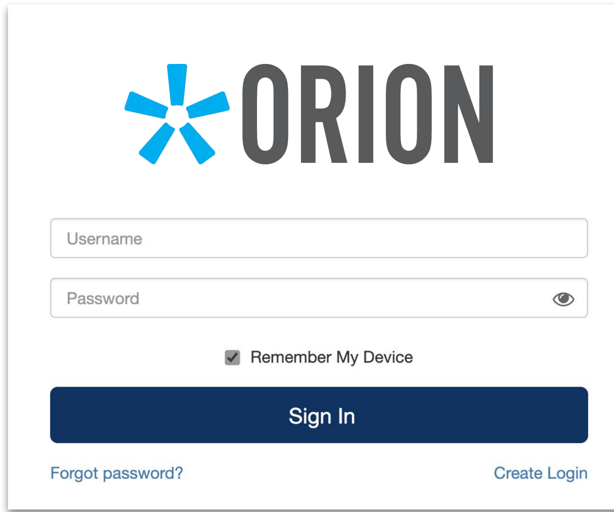
ORION PORTFOLIO SOLUTIONS

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

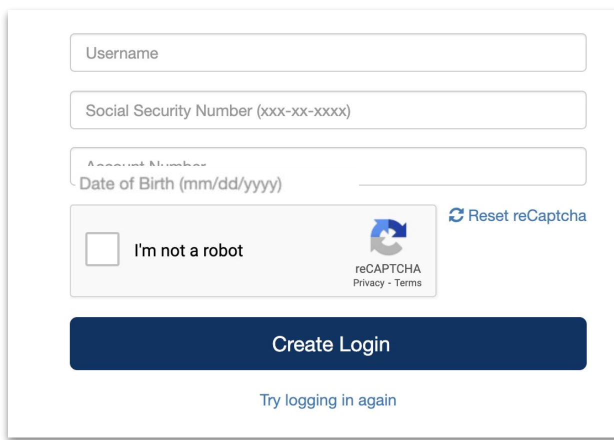
Navigate to portfoliologin.com. If you know your credentials, enter your Username and Password and click Sign In.



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:

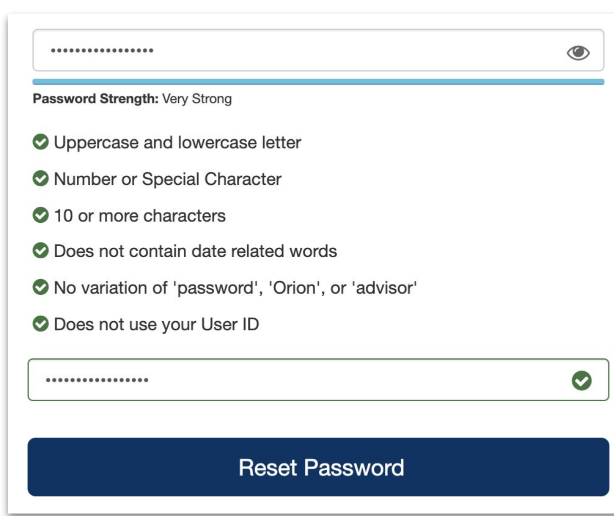
- Enter your email address as your username
- Input required personal information in the additional fields
- Select the I'm not a robot box, and click Create Login
- An email to create a password will be sent to the email we have on file for your household. If you do not see this email, contact your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

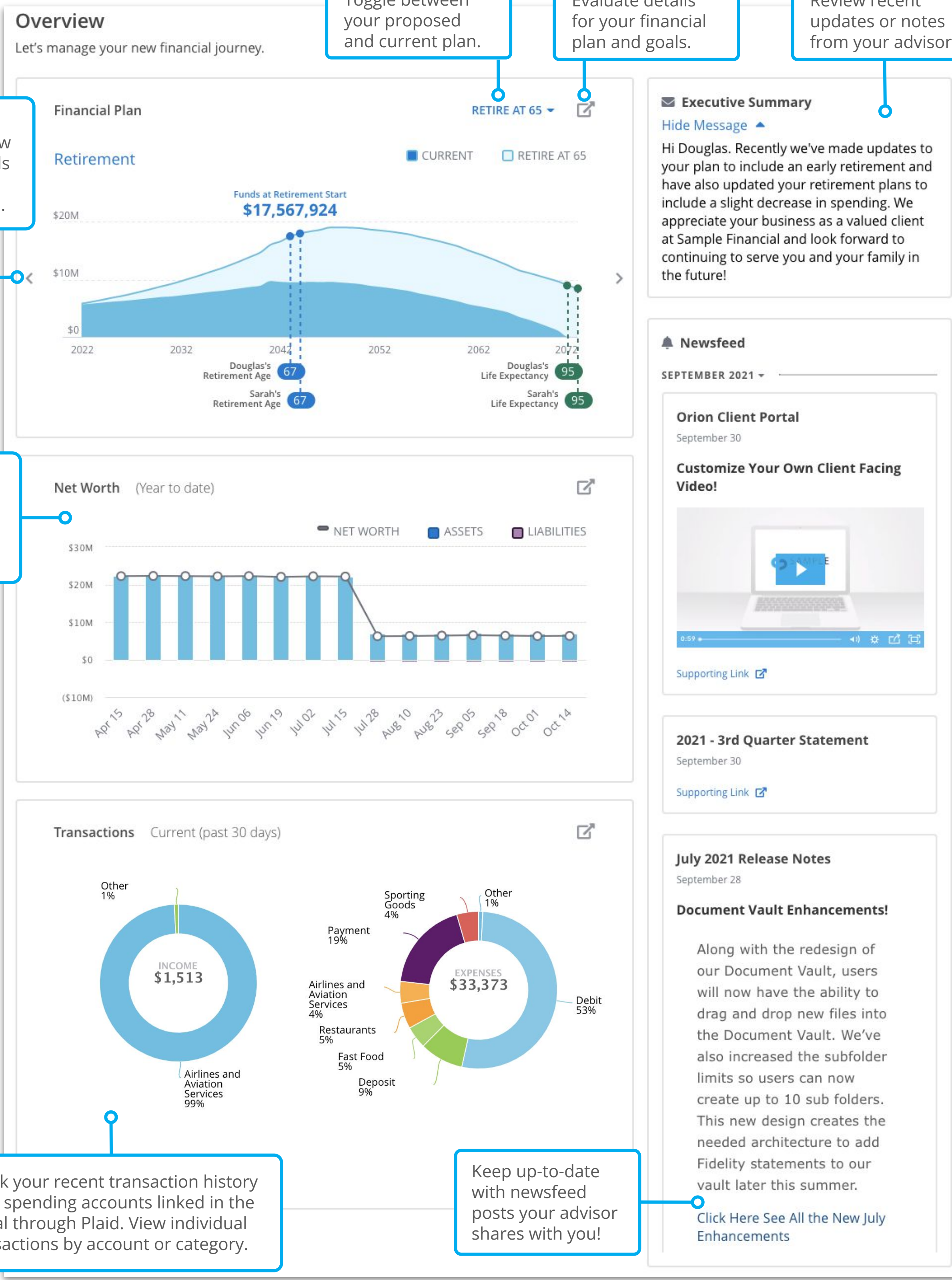
Then, follow the instructions above in the Create Password section of this document.

Client Overview

ORION PORTFOLIO SOLUTIONS

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.



Toggle between your proposed and current plan.

Evaluate details for your financial plan and goals.

Review recent updates or notes from your advisor.

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

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.

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

Client Overview

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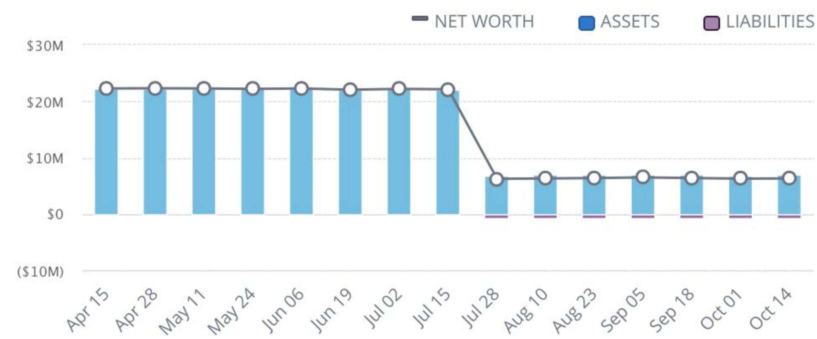
Review recent updates or notes from your advisor.

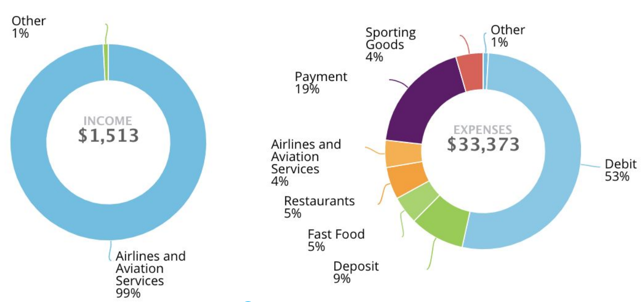
Overview

Let's manage your new financial journey.

Net Worth (Year to date)



Transactions Current (past 30 days)



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

Executive Summary

Hide Message

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!

Supporting Link

2021 - 3rd Quarter Statement

September 30

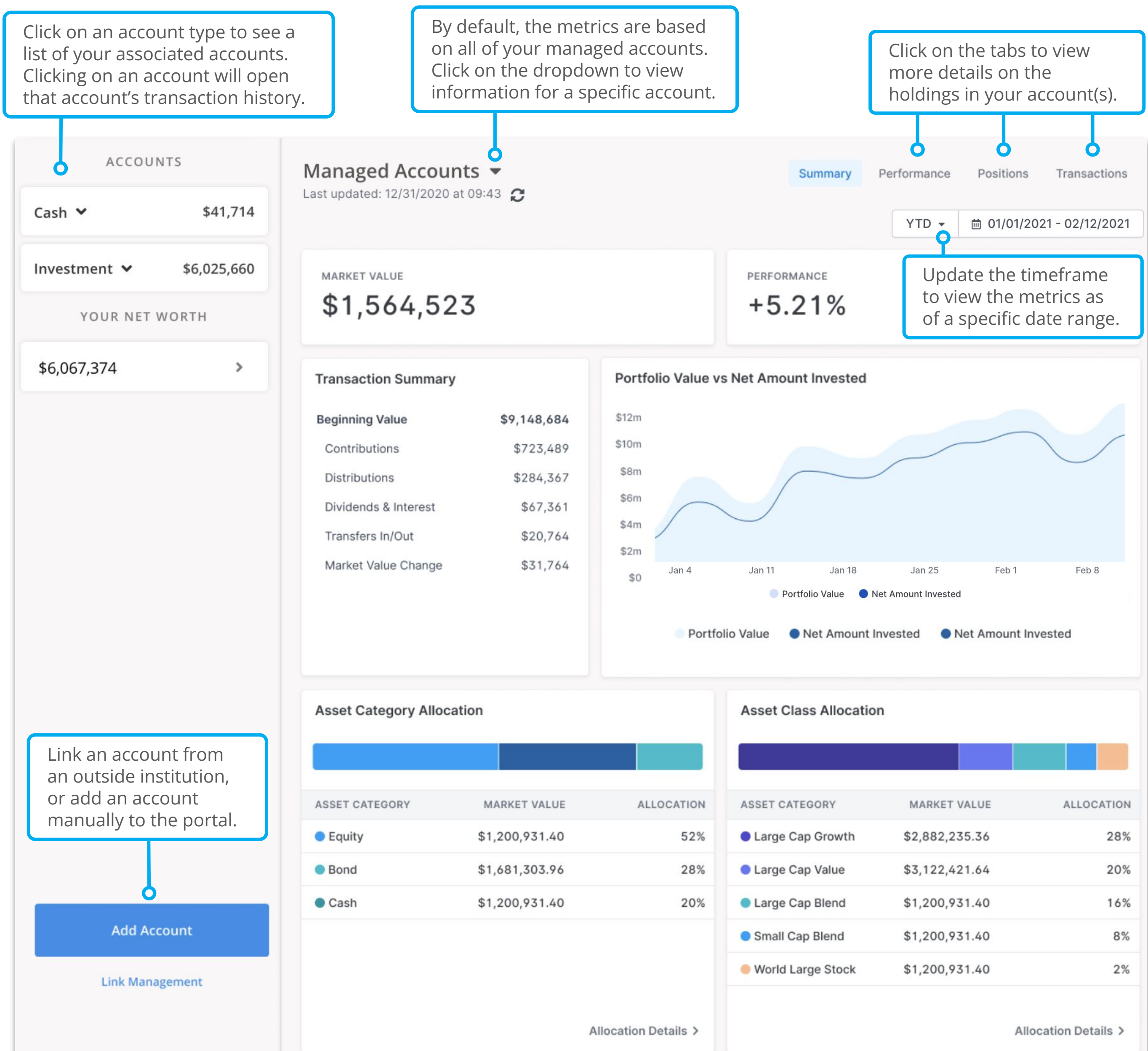
Supporting Link

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

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.



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.