

*ORION Client Portal Overview

Welcome to your financial portal! The portal includes your financial plans, performance, documents, news, and advisor communication in one consolidated experience. This experience empowers you to understand your whole financial picture and puts your financial advisor only one click away for guidance and help.

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'. At the bottom left of the page, 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' (with a dropdown arrow), and 'Date of Birth'. Below these fields is a checkbox labeled 'I'm not a robot' next to a reCAPTCHA logo and the text 'reCAPTCHA Privacy - Terms'. 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'. At the very bottom, there is a text prompt: 'Still having trouble logging in? Please reach out to your administrator.'