

OPS – Orion Portfolio Solutions

Investment Portal Access and Set-up

This guide walks through the process to access your online portal for the first time. The first time you log in, there will be a tutorial video showing features and provides tips on how to get the most out of the online experience.

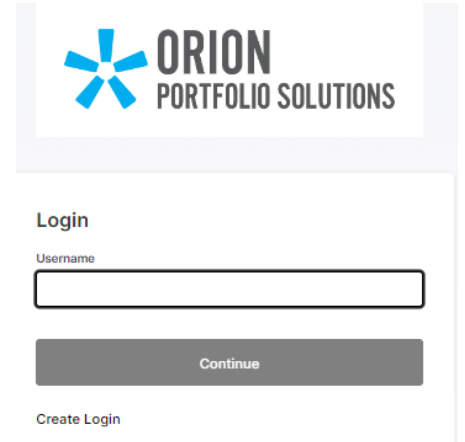
Before you begin, please know that this process works best on a computer or iPad. Cell phones may work, but are more likely to experience problems in the setup process.

Navigate to the website as follows:

www.portfoliologin.com

****You may want to save to Favorites, for future access.**

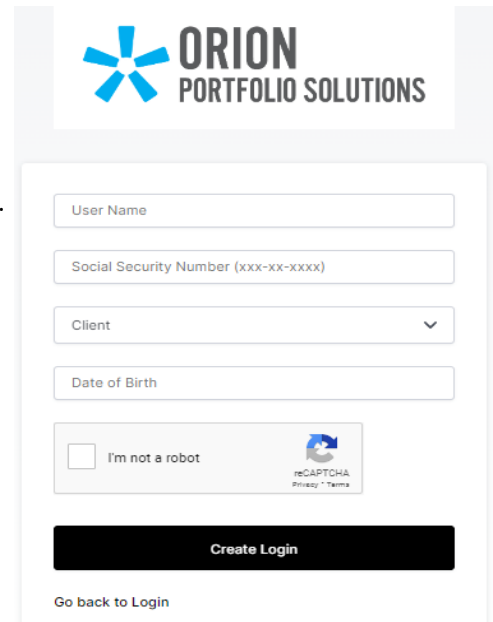
Next, click “Create Login” on the bottom left of the box.



The login screen for Orion Portfolio Solutions. At the top is the logo, which consists of a blue star-like icon and the text "ORION PORTFOLIO SOLUTIONS". Below the logo is a "Login" section. It contains a "Username" label above a text input field. Below the input field is a grey button labeled "Continue". At the bottom left of the login section is a link labeled "Create Login".

On the next prompt:

- You should have provided a primary email address to your Advisor when opening your account. If you are unsure what email address is on file, confirm with your Advisor before you proceed.
- Enter your email address as your username.
- Input the required personal info (SS# & DOB) and press “Create Login”.
- If all info is correct, an email will be sent to create a password and finish the set-up process.
- You must navigate to your email and click the link to finish the setup process. If you do not receive an email, contact your advisor for assistance.
- This email is temporary and will expire after a short time.



The "Create Login" screen for Orion Portfolio Solutions. At the top is the logo, which consists of a blue star-like icon and the text "ORION PORTFOLIO SOLUTIONS". Below the logo is a form with several fields: "User Name", "Social Security Number (xxx-xx-xxxx)", "Client" (a dropdown menu), and "Date of Birth". Below these fields is a checkbox labeled "I'm not a robot" next to a reCAPTCHA logo. At the bottom of the form is a large black button labeled "Create Login". Below the button is a link labeled "Go back to Login".

In the email, click the link. This will take you to a webpage to set your password and complete the setup process. Your password must pass the requirements outlined. Once the process is complete, save your username and password in a safe place. You will need this to log into the website and/or the mobile app.

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Password Strength: Very Strong

✓

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'

✓

Does not use your User ID

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✓


Mobile App

In your phone's app store, search for 'Orion Wealth Management'. The app should appear as shown to the right in blue. Once installed, simply enter your user info to access your portal. The app is enabled with face ID if your device is compatible with this feature.



Reset Your Password

If you forget your password, you will need to enter the username on the login screen and hit "Continue". On the next screen, you will be asked to enter your password or you can click the "Forgot Password" button. This will have you authenticate through email and reset your password. If for some reason your username does not work, contact your advisor for assistance. Your advisor has access to retrieve your username but does not have access to any passwords.



Login

Username

Continue

Create Login

Householding

You will only need to register once per family. All accounts in your household will show up together. You may not see accounts that have a \$0 balance or have not funded yet. Any new accounts you open in the future will be linked to this single login. If using the app on more than one computer or mobile device, simply use the same user information to log in.