

# 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 [www.portfoliologin.com](http://www.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 login form features the Orion logo at the top. Below it are two input fields: 'Username' and 'Password'. The password field has an eye icon for toggling visibility. A checkbox labeled 'Remember My Device' is positioned below the password field. A large blue 'Sign In' button is centered at the bottom. Links for 'Forgot password?' and 'Create Login' are located at the bottom left and right respectively.

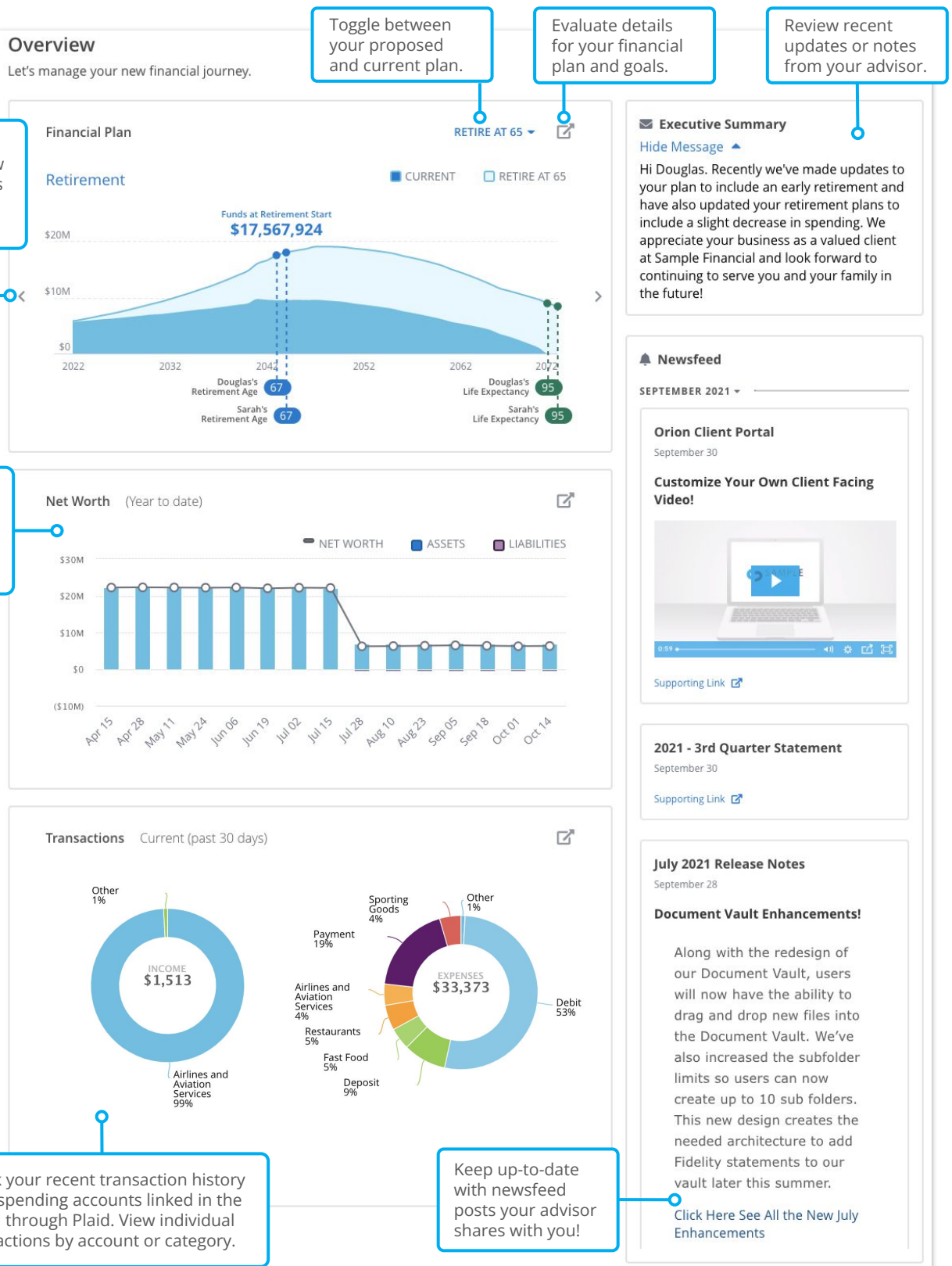
The 'Create Login' form includes fields for 'Username', 'Social Security Number (xxx-xx-xxxx)', and 'Date of Birth (mm/dd/yyyy)'. It also features a reCAPTCHA 'I'm not a robot' checkbox and a 'Reset reCaptcha' link. A large blue 'Create Login' button is at the bottom. A link 'Try logging in again' is located below the button.

This form displays password strength requirements. At the top is a password input field with an eye icon. Below it, the text 'Password Strength: Very Strong' is shown. A list of six requirements, each with a green checkmark, includes: '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'. At the bottom is a confirmation password input field with a green checkmark icon, followed by a large blue 'Reset Password' button.

# Client Overview

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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.



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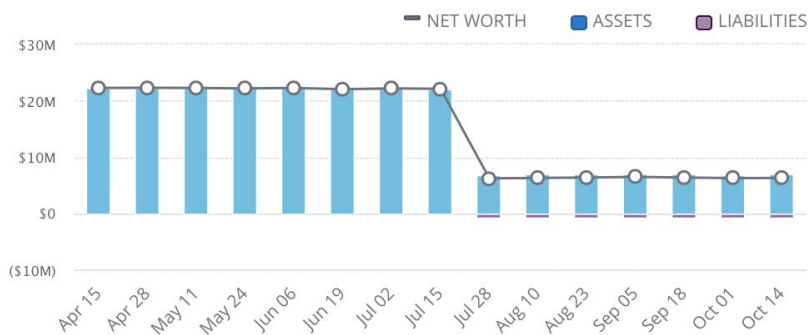
### Overview

Let's manage your new financial journey.

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

Review recent updates or notes from your advisor.

#### Net Worth (Year to date)



#### 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!

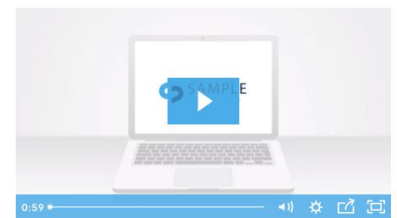
#### Newsfeed

SEPTEMBER 2021

##### Orion Client Portal

September 30

##### Customize Your Own Client Facing Video!



[Supporting Link](#)

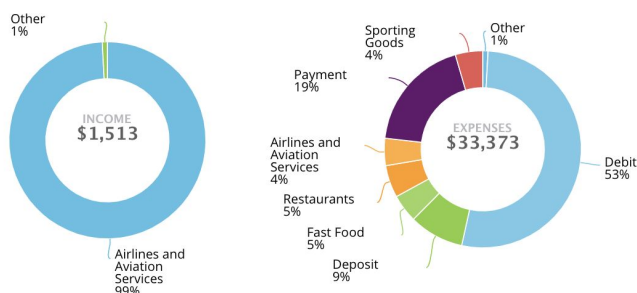
##### 2021 - 3rd Quarter Statement

September 30

[Supporting Link](#)

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

#### Transactions Current (past 30 days)

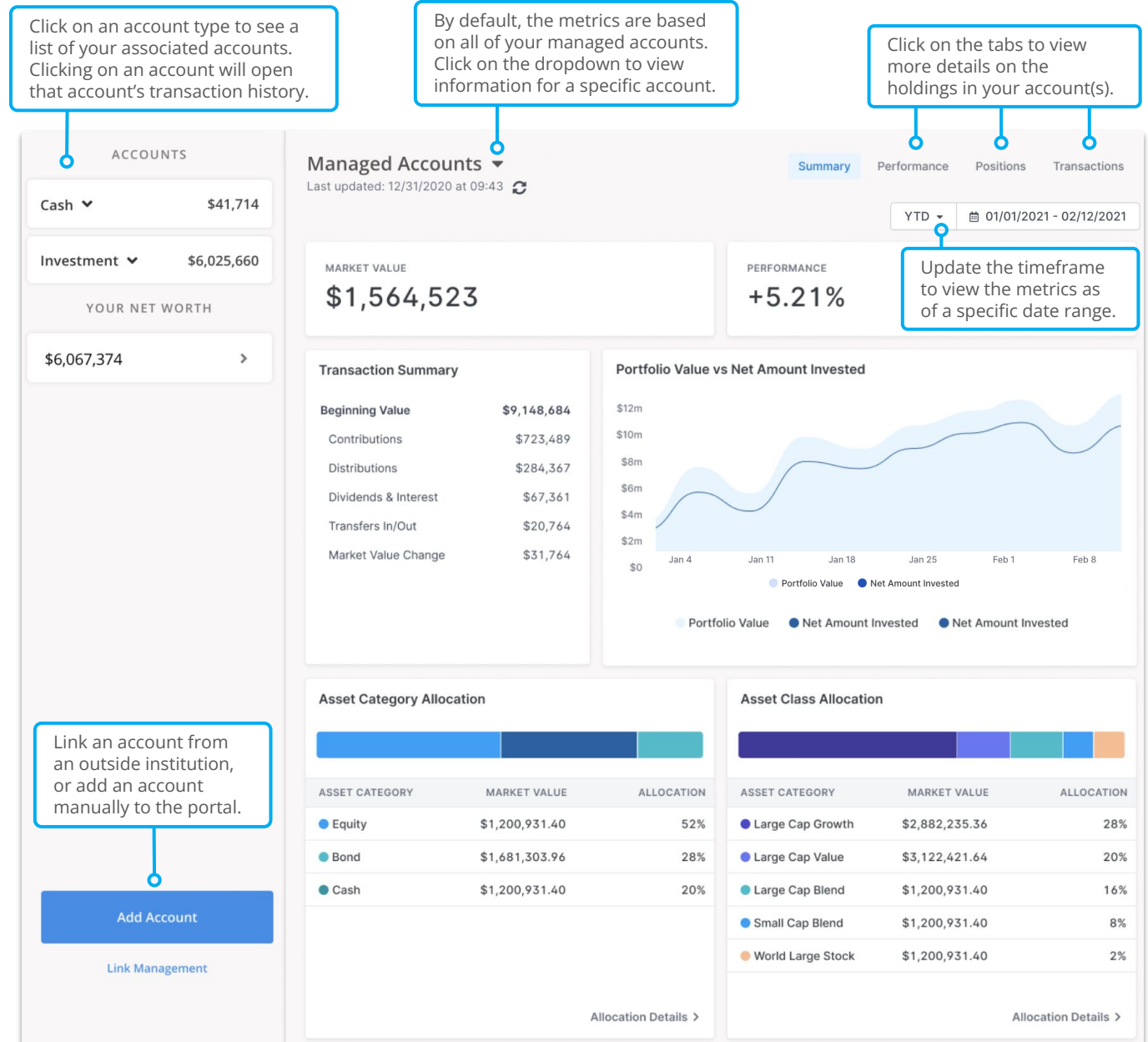


Check your recent transaction history from spending accounts linked in the portal through Plaid. View individual transactions by account or category.

# 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

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.

Document Vault

Home

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

New Folder

Upload

NAME	LAST MODIFIED	FILE SIZE
<div>📁 Custodial Statements</div>		
<div>📁 Portfolio Statements</div>		
<div>📁 Tax Documents</div>		<div>🗑</div>
<div>📁 Test Category</div>		

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

Upload documents into the vault.


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

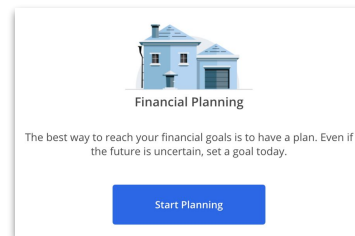
# Create a Financial Plan



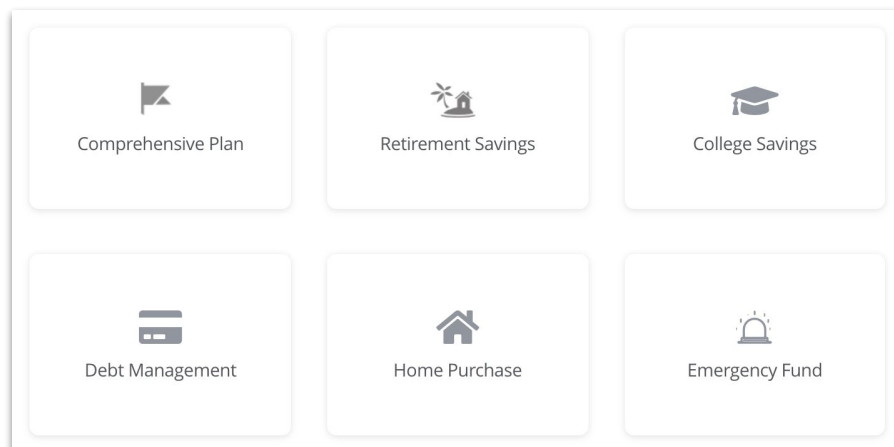
## Overview

An important step in the financial planning process is gathering information. This allows us to make accurate projections, and determine the best course of action to achieve your goals. Follow the instructions below to create your financial plan and add goals to your plan.

1. While on the Client Overview , click [Start Planning](#) in the Financial Planning widget to see available goals.



2. Select a goal for yourself, such as Retirement Savings, College Savings, or Emergency Fund.



3. Complete the questions associated to the goal you selected. Each goal includes common questions relating to your age, income, expenses, and more. There are also specific questions tailored for each goal. Select Next Question to advance forward. Track your progress as you go through goal workflows by viewing the progress bar at the top of each page.

**NOTE:** If you complete multiple goals, the system will automatically populate any overlapping questions you already answered!

[◀ Previous Step](#)60% Complete

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How much money, on average, does your family spend each month?

Exclude mortgage and other loan payments.

**\$6,000**

MONTHLY AMOUNT

[Next Question →](#)

# Your Profile



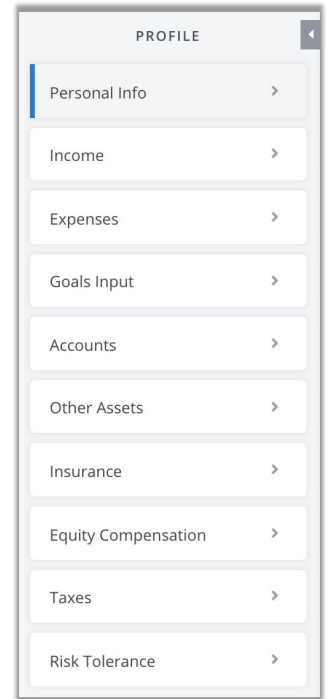
## Profile

Your Profile stores information from your financial plan and comes from completing goal workflows. This information ideally represents everything you are currently doing today and could include expenses that you incur, contributions that you make to accounts, or payments you make on a mortgage. When a financial change occurs in your life, make the appropriate updates in your Profile to accommodate that change. Keep your Advisor informed about any updates so they can help ensure other files are up-to-date.

The Profile is made up of sections to organize your information. If you are completing the Profile on your own, start with Personal Info and continue down the list.

Make sure to save your work before you exit each section. Scroll to the bottom of the page and click [Save Changes](#).

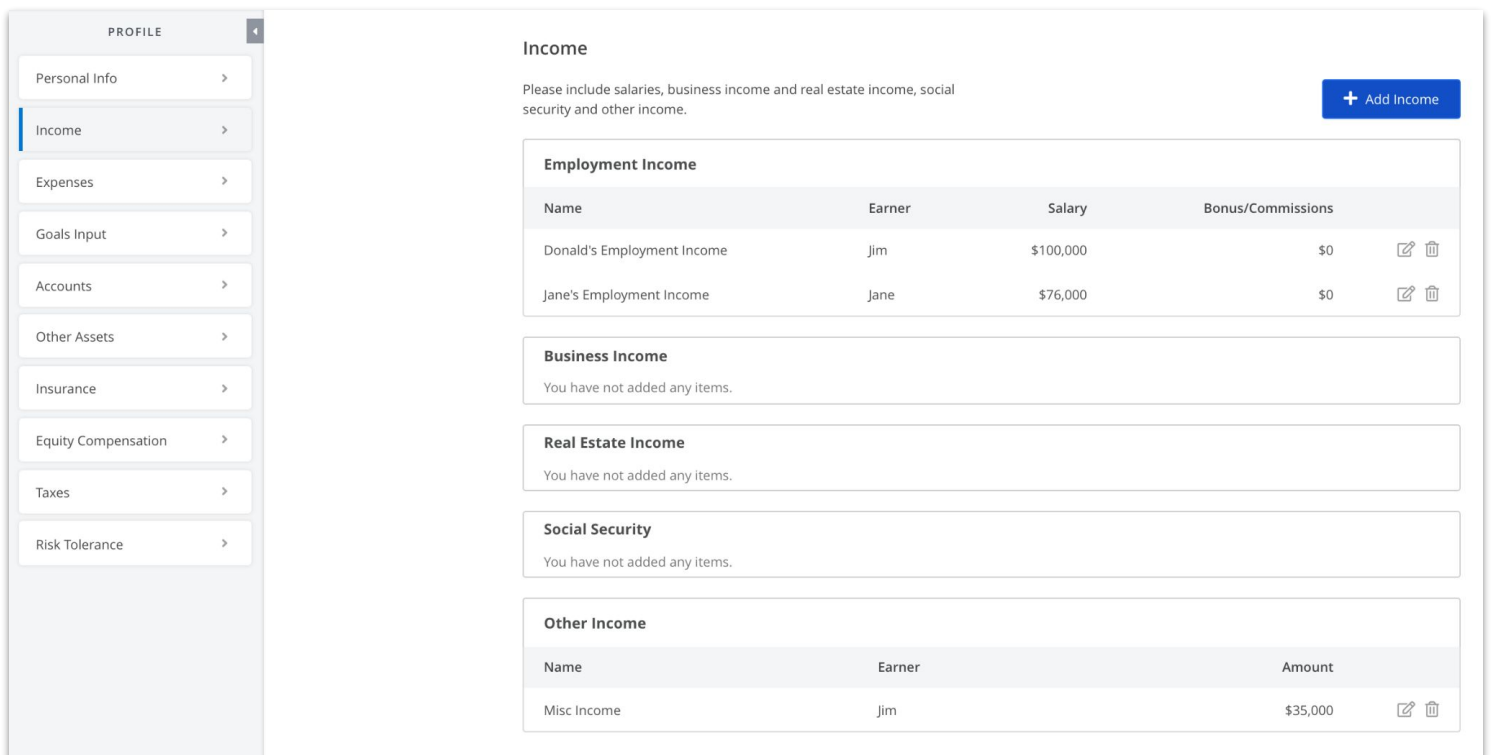
In many of the Profile sections there is a button to add Income, Assets, Insurance Policies, and more. To add information in each of those sections, click [+ Add](#) and make a selection from the available options.



A vertical list of profile sections, each with a right-pointing arrow:

- Personal Info
- Income
- Expenses
- Goals Input
- Accounts
- Other Assets
- Insurance
- Equity Compensation
- Taxes
- Risk Tolerance

For example, in the Income section, click [+ Add Income](#). Then, select the type of income and complete the remaining fields. Follow this same process for each section.



**PROFILE** 1

Personal Info >

**Income** >

Expenses >

Goals Input >

Accounts >

Other Assets >

Insurance >

Equity Compensation >





Taxes >

Risk Tolerance >

### Income

Please include salaries, business income and real estate income, social security and other income. [+ Add Income](#)

#### Employment Income

Name	Earners	Salary	Bonus/Commissions	
Donald's Employment Income	Jim	\$100,000	\$0	 
Jane's Employment Income	Jane	\$76,000	\$0	 

#### Business Income

You have not added any items.



#### Real Estate Income

You have not added any items.

#### Social Security

You have not added any items.

#### Other Income

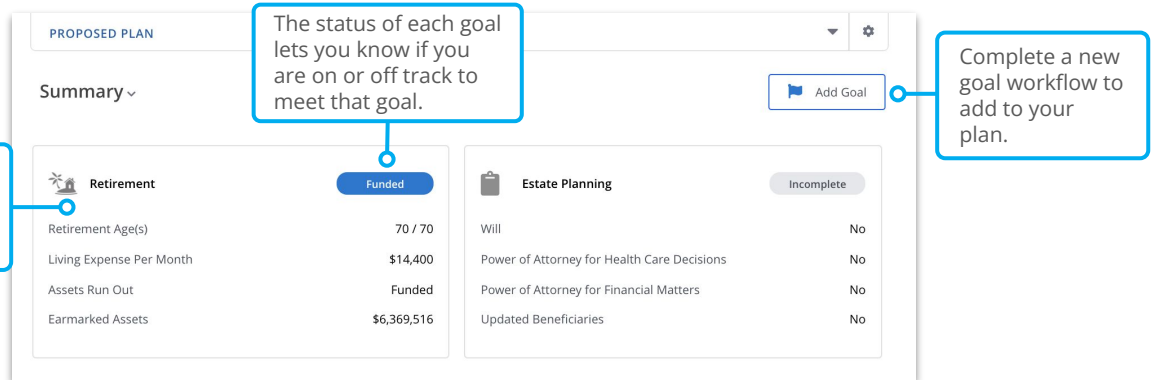
Name	Earners	Amount	
Misc Income	Jim	\$35,000	 



# Financial Plan Results

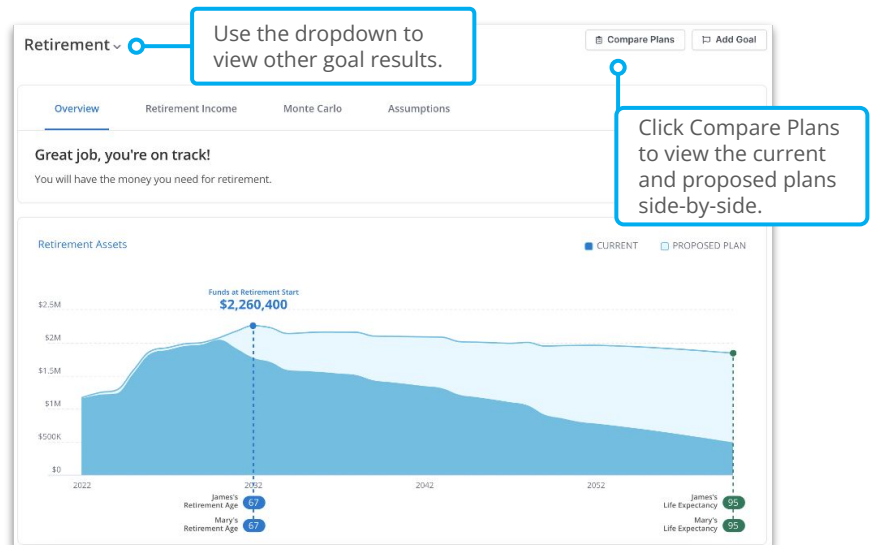
## Goal Results

Monitor a high-level summary of your financial planning goals and drill into detailed information on individual goals.



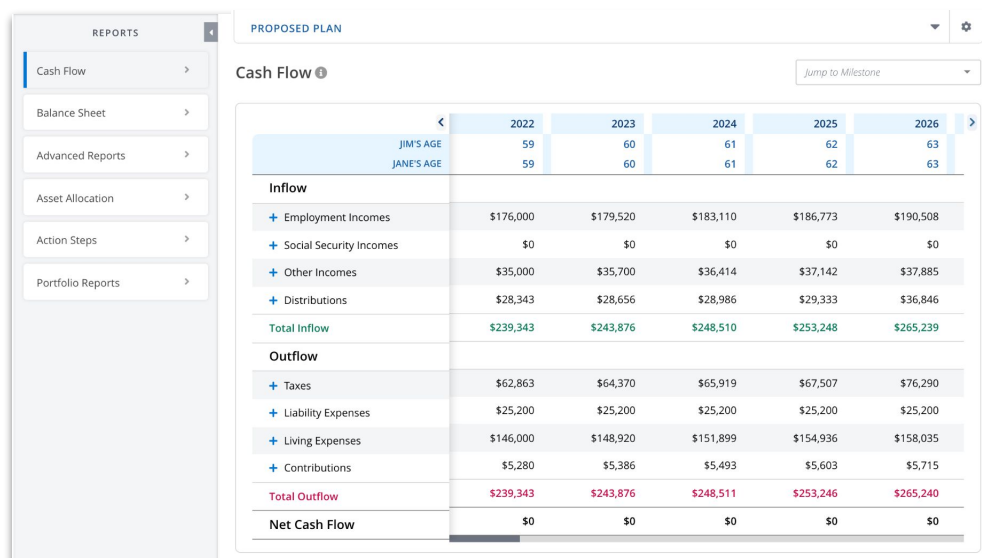
After clicking on a goal, view the projection of the value for your assets for fulfilling that goal.

The dark shaded blue represents your results based on current information in the system today. The lighter shaded blue represents your estimated results if you implemented the recommendations.



## Reports

Access even more information about your goals and finances in Reports. Use the tabs on the left to view projected cash flows, values of individual assets and liabilities, action steps for achieving your goals, and more!



	2022	2023	2024	2025	2026
<b>JIM'S AGE</b>	59	60	61	62	63
<b>JANE'S AGE</b>	59	60	61	62	63
<b>Inflow</b>					
+ Employment Incomes	\$176,000	\$179,520	\$183,110	\$186,773	\$190,508
+ Social Security Incomes	\$0	\$0	\$0	\$0	\$0
+ Other Incomes	\$35,000	\$35,700	\$36,414	\$37,142	\$37,885
+ Distributions	\$28,343	\$28,656	\$28,986	\$29,333	\$36,846
<b>Total Inflow</b>	<b>\$239,343</b>	<b>\$243,876</b>	<b>\$248,510</b>	<b>\$253,248</b>	<b>\$265,239</b>
<b>Outflow</b>					
+ Taxes	\$62,863	\$64,370	\$65,919	\$67,507	\$76,290
+ Liability Expenses	\$25,200	\$25,200	\$25,200	\$25,200	\$25,200
+ Living Expenses	\$146,000	\$148,920	\$151,899	\$154,936	\$158,035
+ Contributions	\$5,280	\$5,386	\$5,493	\$5,603	\$5,715
<b>Total Outflow</b>	<b>\$239,343</b>	<b>\$243,876</b>	<b>\$248,511</b>	<b>\$253,246</b>	<b>\$265,240</b>
<b>Net Cash Flow</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>



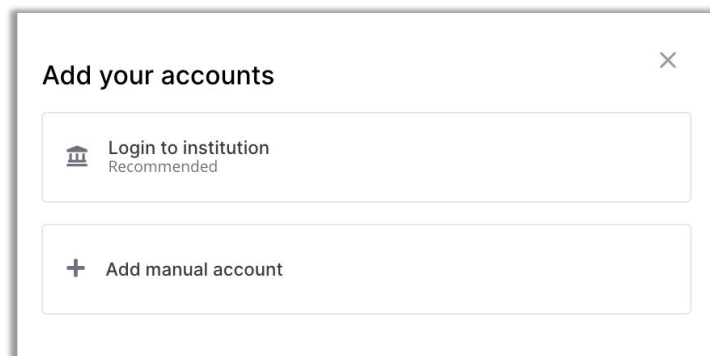
# Link Outside Accounts

## Overview

View all of your finances in one convenient location! Link your investment accounts, credit cards, or check/saving accounts to the portal to automatically receive updated account balances, asset allocations, and transaction information.

From the Client Overview  click [Add Account](#) in the bottom left corner. Select **Login to institution**.

**Please Note:** You also have the option of manually adding an account by selecting **+ Add manual account**.



The dialog box titled "Add your accounts" has a close button (X) in the top right corner. It contains two main options: "Login to institution" with a bank icon and the text "Recommended", and "+ Add manual account".

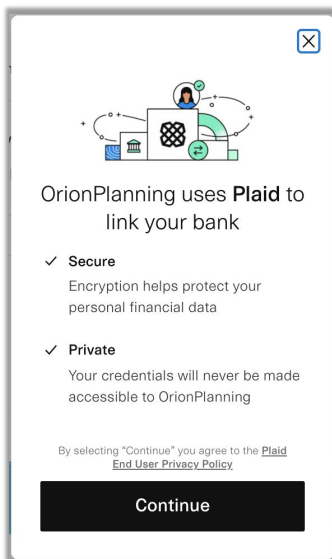
A window appears that provides Security and Privacy information for account linking.

Click **Continue** to link an account.

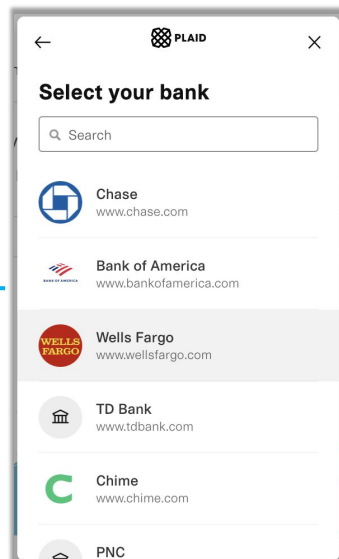
Search for the institution you would like to link to your portal or select one from the list of frequently used institutions.

Enter your **username** and **password**. Depending on your institution, they might ask you an additional security question.

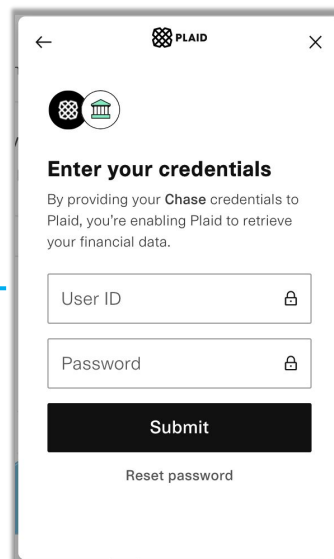
If the information you entered matches the information at your institution, you successfully linked your account!



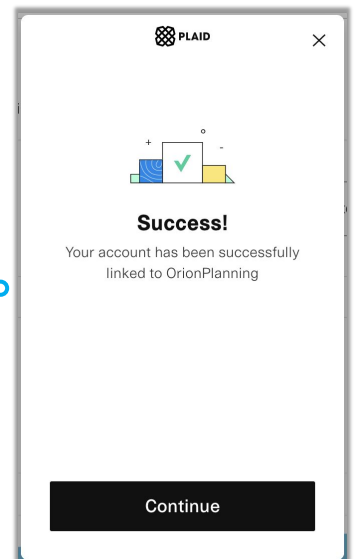
The screen shows a header with a close button (X). Below is an illustration of a person with a magnifying glass over a document. The text reads: "OrionPlanning uses Plaid to link your bank". There are two sections: "Secure" with a checkmark and "Private" with a checkmark. At the bottom, it says "By selecting 'Continue' you agree to the [Plaid End User Privacy Policy](#)". A large black "Continue" button is at the bottom.



The screen shows a header with a back arrow, the Plaid logo, and a close button (X). The title is "Select your bank". There is a search bar. Below is a list of banks: Chase, Bank of America, Wells Fargo (highlighted), TD Bank, Chime, and PNC. Each bank has its logo and website URL.



The screen shows a header with a back arrow, the Plaid logo, and a close button (X). The title is "Enter your credentials". Below is a message: "By providing your Chase credentials to Plaid, you're enabling Plaid to retrieve your financial data." There are two input fields: "User ID" and "Password". A large black "Submit" button is below. At the bottom, there is a link for "Reset password".




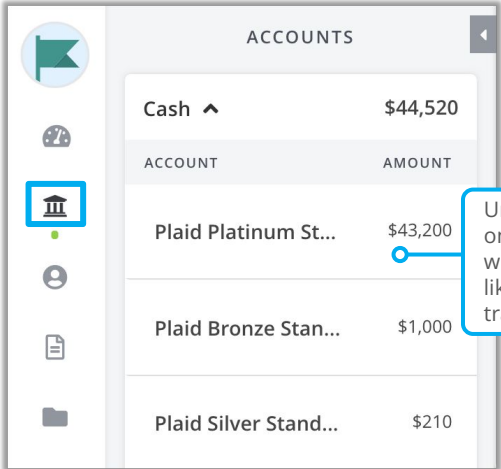
The screen shows a header with the Plaid logo and a close button (X). Below is an illustration of a bar chart with a green checkmark. The text reads: "Success! Your account has been successfully linked to OrionPlanning". A large black "Continue" button is at the bottom.

Repeat these steps for each account you would like to link to the portal. Then, view these accounts on the Client Overview page in the Accounts menu on the left sidebar menu.

# Transaction Overview

After linking spending accounts to the portal, take advantage of the Transactions Page to easily review deposits and withdrawals for your accounts on a monthly basis.

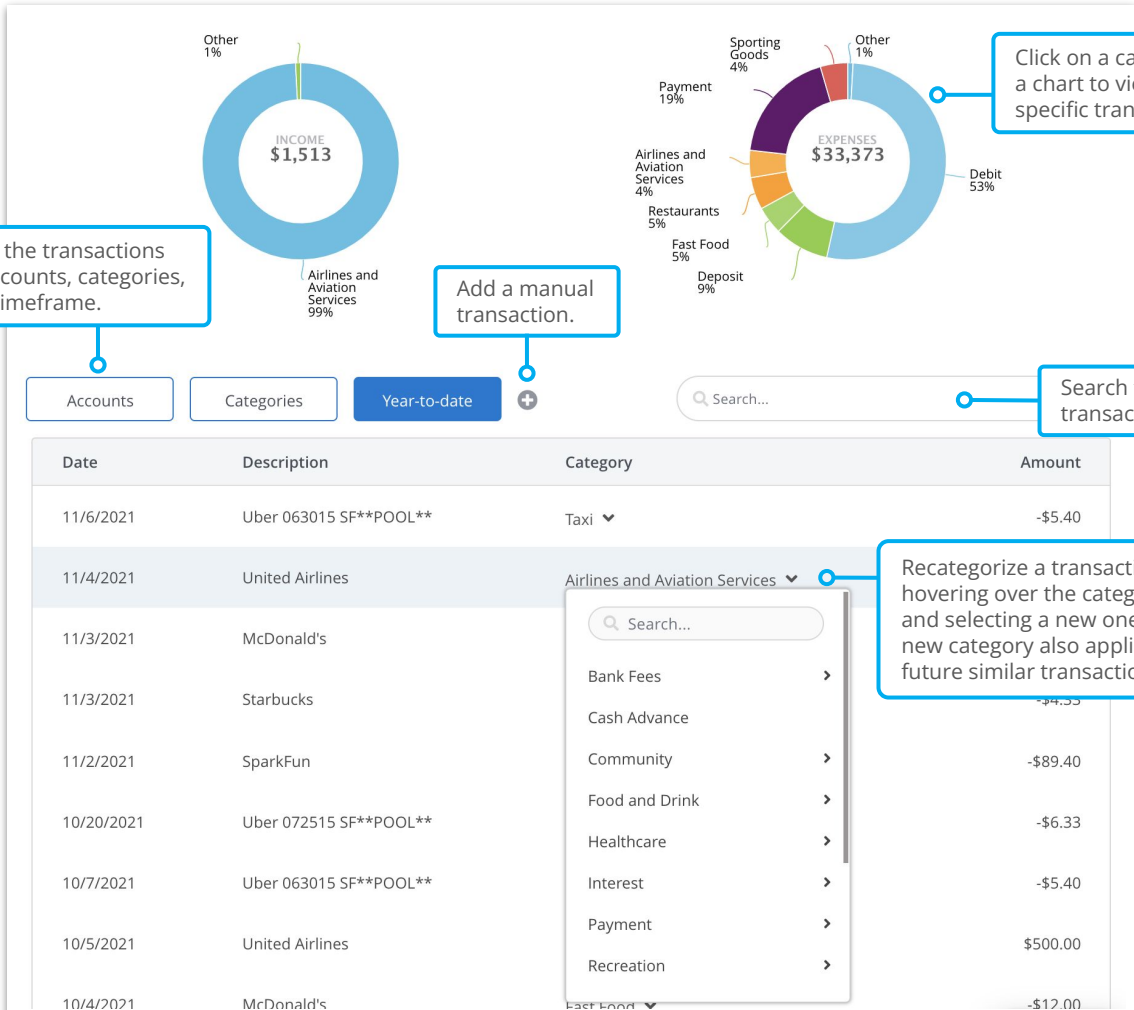
1. Click the Personal Finances  option to navigate to the Transactions page.
2. From the Net Worth banner, click on the **Cash** section to display spending accounts.
3. Select a linked account to view the transactions.



Under **Cash**, click on the account for which you would like to view transactions.

## Managing Transactions

The left pie chart represents income, while the right pie chart represents expenses. Different categories of income and expenses are distinguished with varying colors.



Filter the transactions by accounts, categories, and timeframe.

Add a manual transaction.

Click on a category in a chart to view those specific transactions.

Search for a specific transaction.

Recategorize a transaction by hovering over the category and selecting a new one. This new category also applies to future similar transactions.

Date	Description	Category	Amount
11/6/2021	Uber 063015 SF**POOL**	Taxi	-\$5.40
11/4/2021	United Airlines	Airlines and Aviation Services	
11/3/2021	McDonald's		
11/3/2021	Starbucks		
11/2/2021	SparkFun		-\$89.40
10/20/2021	Uber 072515 SF**POOL**		-\$6.33
10/7/2021	Uber 063015 SF**POOL**		-\$5.40
10/5/2021	United Airlines		\$500.00
10/4/2021	McDonald's		-\$12.00