CLIENT PORTAL

Your clients can have it all with Orion's Web Portal.

Orion's Client Web Portal means you can show your clients all their accounts, all in one place, wrapped up in an easy to navigate, minimal design. You have full control over what information or reports your clients can access through your portal, and it can be customized and branded entirely to match your firm's unique style.

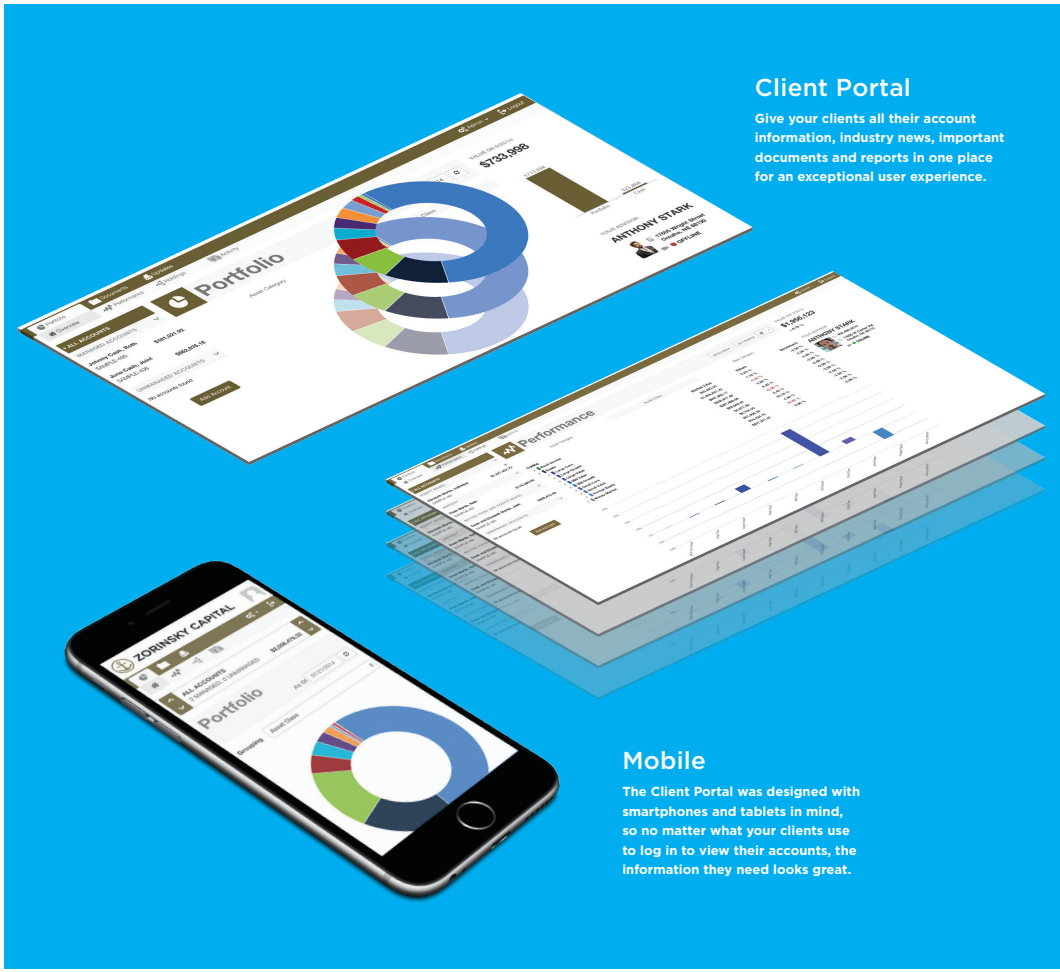
You control what information or reports your clients can access through your portal. Do you want clients to run their own performance reports for any date range they choose? Go ahead and enable it. If you want to craft a more structured environment for your clients, however, that decision is completely in your hands.

Using a client portal provided by Orion means you can give your clients more options. A website doesn't have to be a passive experience. Put up special blogs or notes on upcoming events for your clients to read, and give them the option to contact you directly through your client portal.

Text Notifications

Extend the power of your Client Portal with text message updates powered by the Orion platform. You can create customizable text alerts to communicate portfolio updates automatically or on-demand, and even allow your clients to schedule meetings with you through SMS text messages.

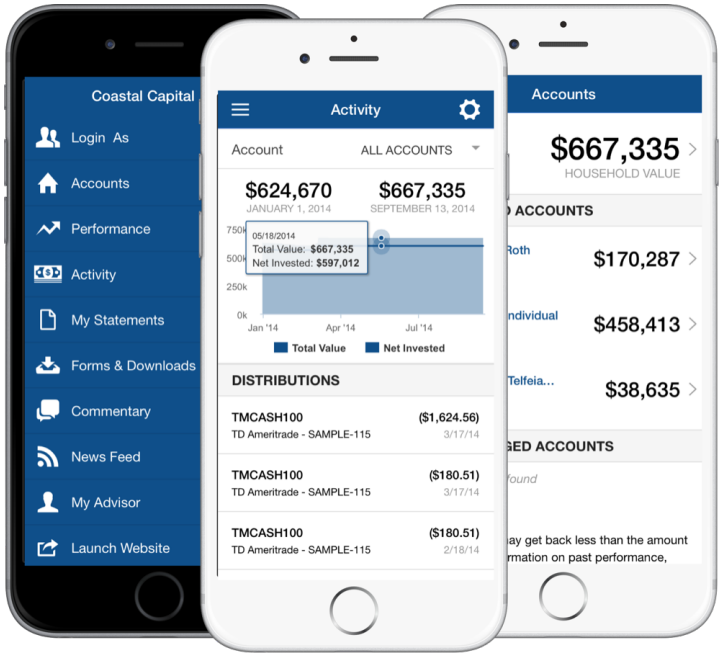
> ***Our clients have been very impressed with the Orion client portal because it provides them with a wealth of information in the context of a user-friendly, visual interface. We even use it to communicate information in client meetings, which encourages non-users to become users. The high adoption rate among our non-tech-savvy clients attests to the portal's effectiveness.***
>
> ANDY MILLARD
> MILLARD & COMPANY, INC.



Client Access ANYWHERE

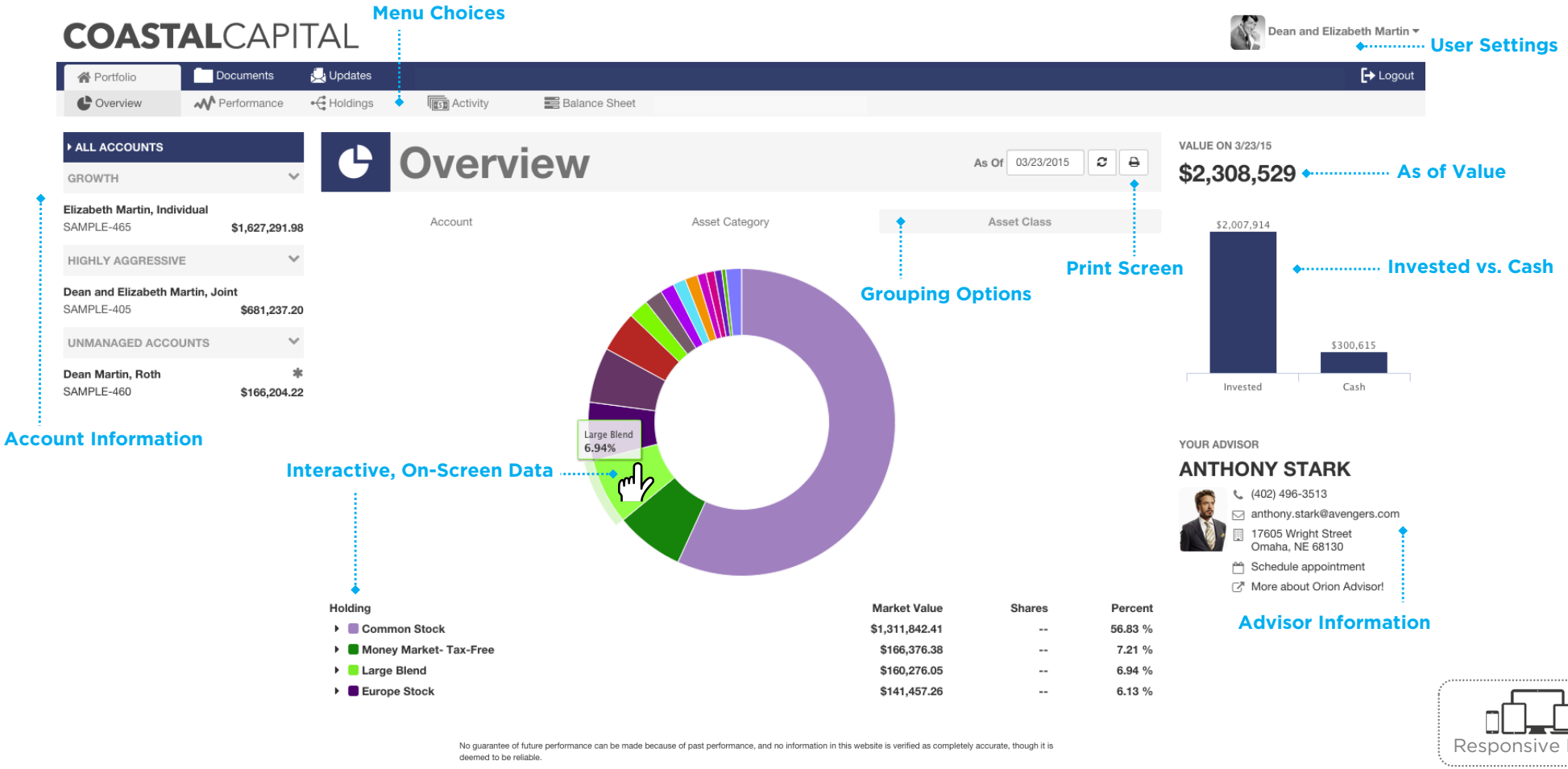
Client Portal or Mobile App

- View Portfolio Values, Performance and Activity
- Run Reports or View Stored Reports
- Access to Cloud Storage
- View Advisor Commentary + Documents



Mobile App

Via the App Store, Google Play or Windows Phone

Client Portal

To get started go to the **Orion Connect Home Page** and click on the **Client Portal App**; select a **Client Name** and click **Launch**.