CLIENT

AE WEALTH MANAGEMENT

Orion Two-Factor Authentication
Client Overview

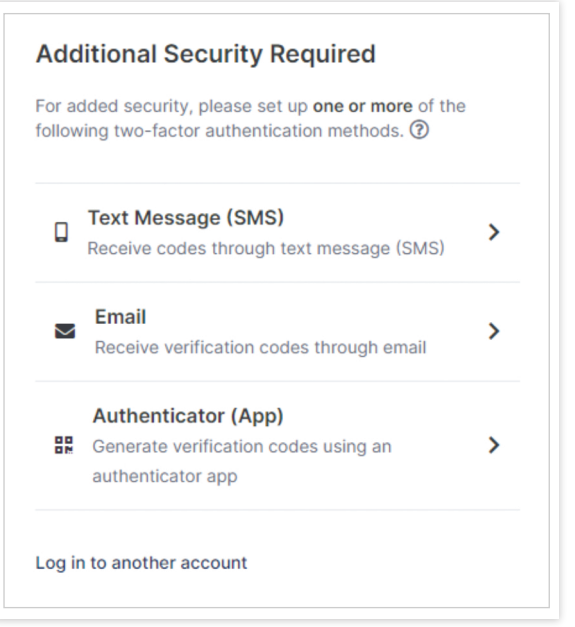
Two-Factor Authentication (2FA), also known as Multi-Factor Authentication (MFA), is mandatory when logging into Orion. This policy is in place to help protect sensitive data and information. Each user is granted access to Orion after successfully presenting two pieces of information. After initial setup, in addition to entering your username and password when logging in, you'll also be asked to enter a registration code for 2FA. You'll be able to select whether this code is sent to you through a text message, notification to your email, or via authenticator app. After entering the code, log into the system as usual. Review the sections below to understand the user experience upon logging in, how to make changes to authentication information (if necessary) and troubleshoot common things that may occur during the setup process.

Initial Setup Process

When logging into Orion or the client portal for the first time, enter an email address and mobile phone number where you would like to receive registration codes for two-factor authentication.

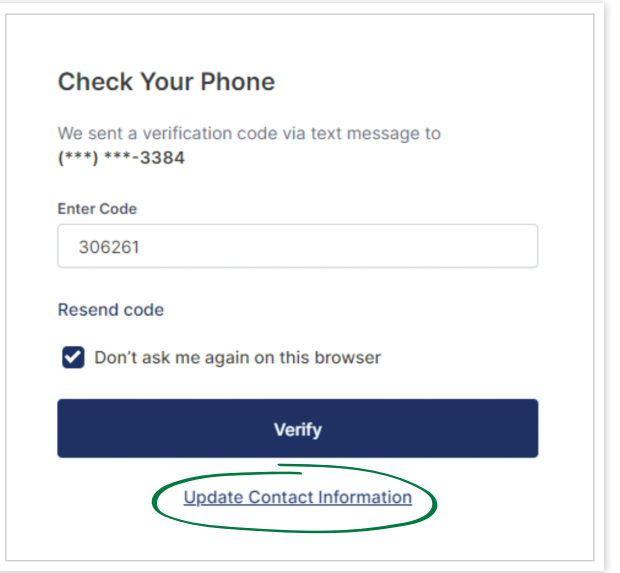
NOTE

This should be an email address and phone number you have access to. Once you click SAVE, you are redirected to the login page to re-authenticate your username and password. It is suggested to adopt SMS text message for 2FA.



Routine Login Process

1. Check the **Remember My Device** box when logging in to ensure that a registration code does not have to be entered at each login.
2. The client can change the method of 2FA by selecting **Update Contact Information**



NOTE

The two-factor authentication registration code for SMS or email expires 15 minutes after it is sent. Depending on the 2FA authentication app, the code may expire before 15 minutes if the client has elected that method. After it expires, you must select the 'Use an alternate registration method' and click 'Send Code' for a new code to be sent.

Frequently Asked Questions

Will I be prompted to enter a registration code each time I log into Orion?
After you establish your 2FA information and you've logged in at least one time using a registration code, you won't need to authenticate your information each time if you check the 'Remember My Device' box when logging in. If you do not check this box, log into Orion using a different device, or clear your cache, you will be prompted to authenticate your information.

When does the 2FA registration code expire?
The 2FA registration code expires 15 minutes after it is sent. After it expires, you must select the 'Use an alternate registration method' and click Send Code for a new code.

What is included in the email notification and text message sent for Two-Factor Authentication?
A standard notification is sent from (402) 513-9024 for text messages or portal@orionadvisor.com for email notifications. The text within the notifications for both options is "Your One-Time Registration Code, ******."

What if I forget, or no longer have access to my Two-Factor Authentication email or phone number?
If you are having issues logging into the system, contact an admin at your firm. They will be able to update the assigned phone number and email you established for 2FA.