Orion Client Portal Mobile App

Purpose

This document provides an overview of each tab within the client portal (Investment HQ) mobile app. The client portal mobile app allows your firm to provide a unique experience by giving your clients easy access to the most common features from their portal.

References

- Investment HQ App
- Orion Client Portal

Installing the App

1. Search *Investment HQ* in the Google Play or Apple store. Navigate to the app profile in the app store and select *Install* from the mobile device.
2. Navigate to the downloaded app and have the client enter their Orion Client Portal credentials.

   NOTE: Clients should not try to access the Orion Client Portal in a mobile browser, such as Safari; the system is not compatible with this format.

Overview Tab

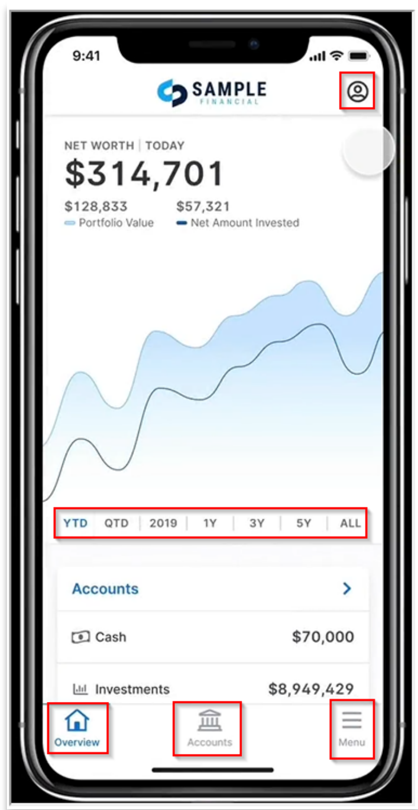
The Overview tab is the landing page for the app and displays an interactive graph of the client's Portfolio Value versus Net Amount Invested.

Update the time interval for the graph directly below it using the timeframe buttons such as **YTD, QTD, 2019, etc.**

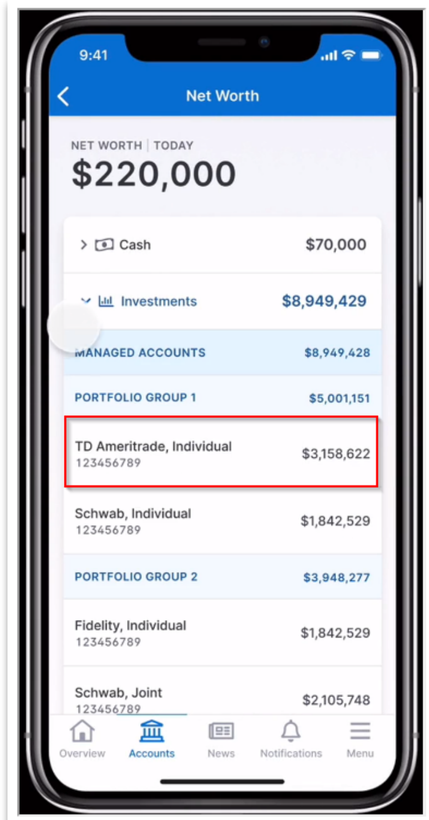
The Accounts section below the graph displays the total value of each category that is a part of the client's portfolio including **Cash, Investments, Credit, and Net Worth**.

Toward the bottom of this tab, the three most recent posts from your firm's **News Feed** are shown.

NOTE: Within the advisor's version of the app, there is an option to impersonate a client in order to view information that pertains specifically to that client. Start by clicking on the person icon in the upper right corner on the **Overview** tab and select the applicable client.



Accounts Tab



Dive deeper into each account within the Accounts tab. This provides a breakdown of each account that is linked to the client portal.

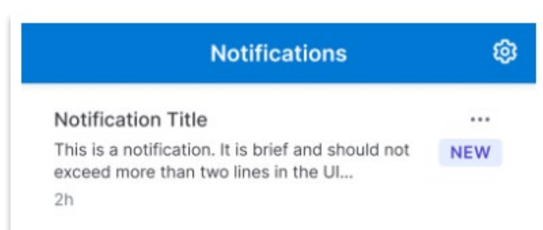
Clicking on an account will show the user the **Portfolio Summary, Asset Allocation, Portfolio Return, and Transaction Summary** for that account. Clicking on any of these items will also lead to more specific information.

For example, clicking on Portfolio Return for an investment will display an overview of the performance return compared to the assigned benchmarks.

News Tab

The three most recent Newsfeed posts display in the Overview tab, but all the Newsfeed stories display on the **News** tab. This connects to pre-approved AEWM content such as our Wealth Reports and Market Minutes.

Notifications Tab



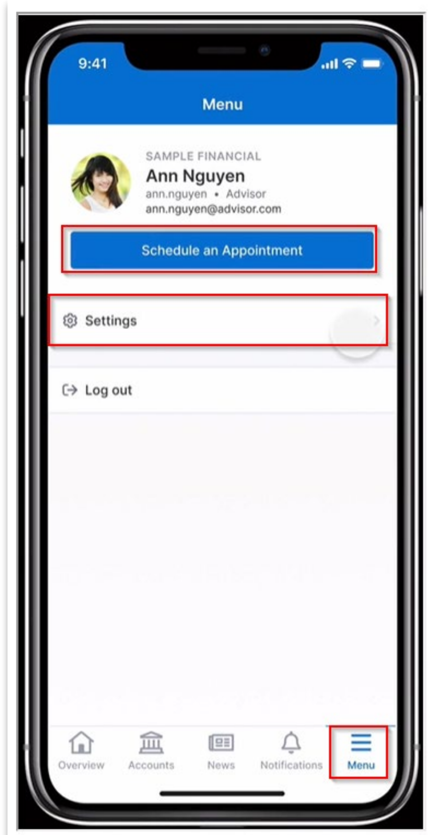
Every time a News Feed post is created, a push notification will be sent to your client. All notifications will appear within this tab. Clicking on a notification allows the user to mark as read, dismiss this notification, or turn off notifications pertaining to a certain area.

The client is able to update more settings relating to notifications by navigating to **Settings** within the Menu tab.

Menu Tab

The Menu tab is where clients can **schedule an appointment** with their advisor, access the documents and statements uploaded to their **Document Vault**, and update the **settings** for the mobile app that relate to security and notifications.

Your firm's Disclosure, Terms of Service, and Privacy Policy are also stored within the settings here.



Additional Issues

If you have Investment HQ app issues, contact appsupport@ae-wm.com for assistance. Please include the information below in your email:

- A screenshot of the issue (if possible)
- The client that the issue is affecting
- The username the client is using to log in
- The specific device being used by the client (i.e., iPhone 14, Samsung Galaxy S22, etc.)
- A detailed description of the issue encountered by the client

These issues will be researched on a case-by-case basis. Please provide as much of the requested information as possible to ensure a timely resolution.