Orion Client Portal Mobile App

Purpose

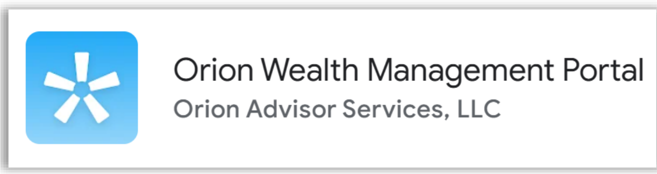
This document provides an overview of each tab within the Orion Client Portal Mobile App. The Client Portal Mobile App allows your firm to provide a unique experience by giving your clients easy access to the most common features from their portal.

References

- Investment HQ App & Orion Wealth Management Portal App
- Orion Client Portal

Installing the App (Apple Store)

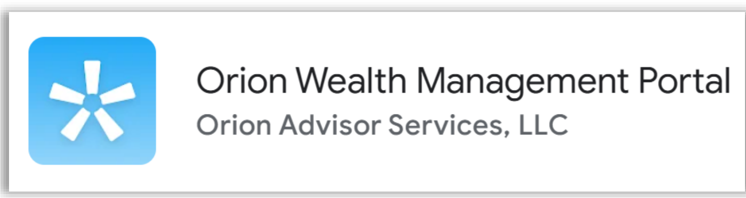
1. Search *Investment HQ* or *Orion Wealth Portal Management* in the Apple App Store. Navigate to the app profile in the app store and select *Install* from the mobile device.



NOTE: Both apps are available in the Apple App Store. The new Orion Wealth Management Portal has some updated features that the Investment HQ app does not have.

Installing the App (Google Play Store)

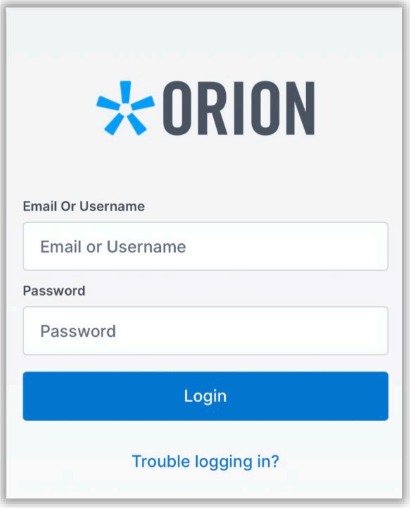
1. Search *Orion Wealth Portal Management* in the Google Play Store. Navigate to the app profile in the app store and select *Install* from the mobile device.

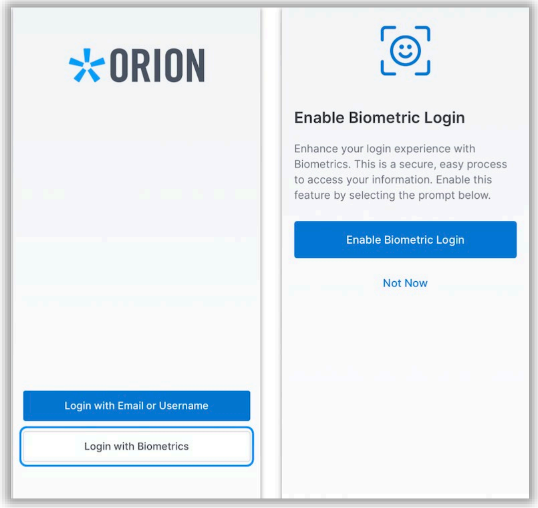


NOTE: The new Orion Wealth Management Portal is the online Client Portal Mobile App available in the Google Play store. You will no longer be able to find Investment HQ within the store.

Getting Started with the App

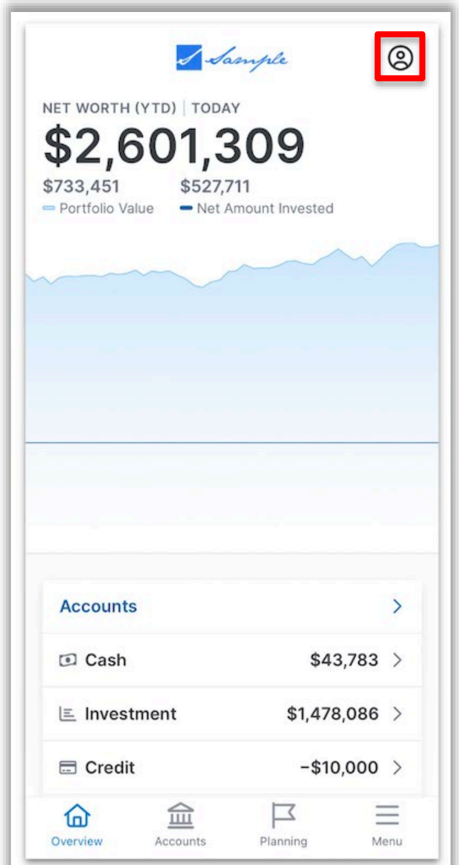
1. Navigate to the downloaded app and have the client enter their Orion Client Portal credentials – which are the same credentials used when logging in on a desktop or browser. Two-Factor Authentication will be required after logging in – or the client can enable Biometrics to login using Face ID the next time they enter the app.





<u>NOTE</u>: 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

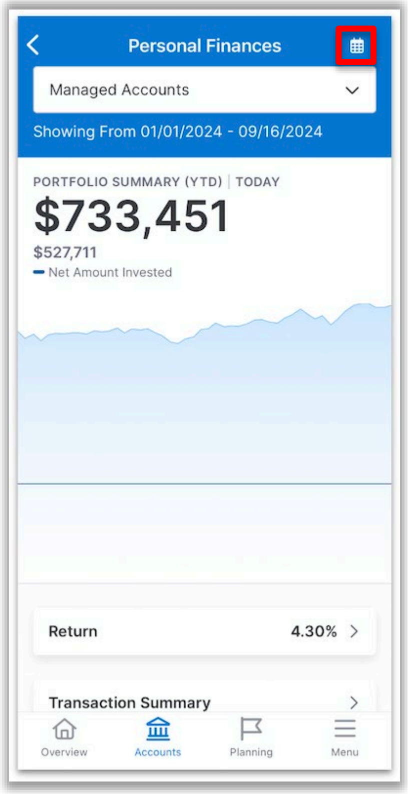


The Overview tab displays an interactive graph of the client's Portfolio Value versus Net Amount Invested. The portfolio summary graph is interactive by tapping and sliding along the chart.

The section below the graph displays the total value of each portfolio category including **Cash, Investments, Credit, Net Worth, Loan, and Other Assets.** Select any of these categories to view additional details in the Accounts tab.

<u>NOTE</u>: 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 of the **Overview** tab and select the applicable client.

Accounts Tab



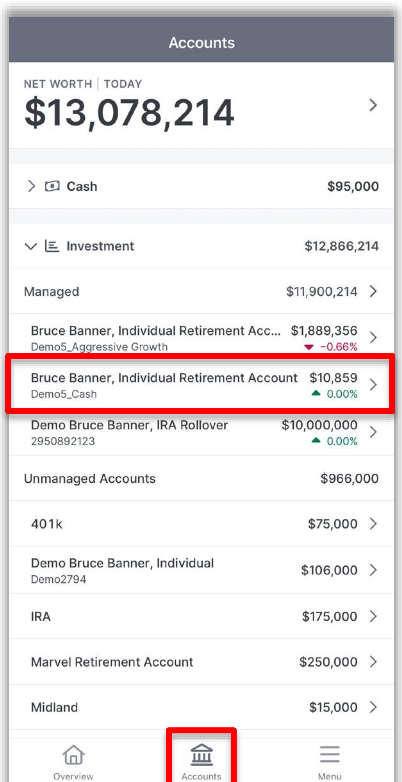
The Accounts Tab is the landing page for the app and allows you to dive deeper into each account. This provides a breakdown of each account that is linked to the client portal.

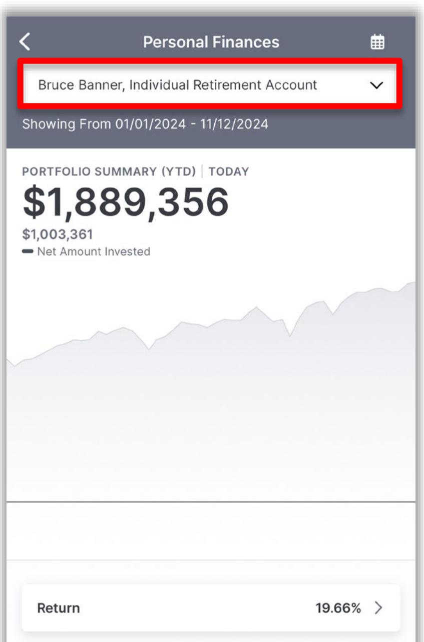
Update the time interval for the graph by clicking on the calendar icon in the upper right corner.

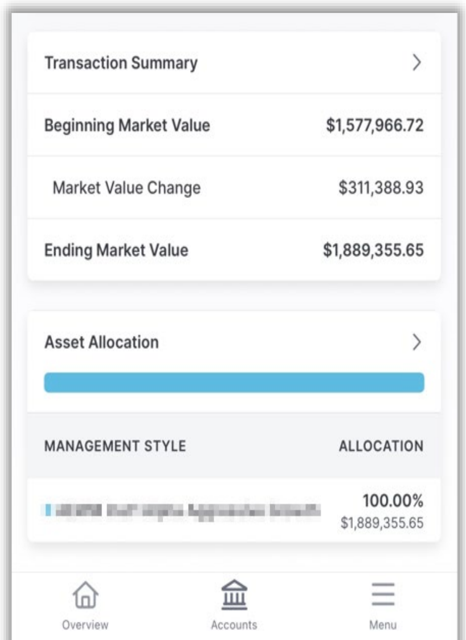
Selecting any ***managed account*** from the dropdown menu at the top of the screen will show the user the **Portfolio Summary, Asset Allocation, Portfolio Return, and Transaction Summary** for that specific account.

NOTE: if you want to view the information for all of your accounts at once, leave the dropdown set to "Managed Accounts"

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 benchmark(s).







Menu Tab

The Menu tab is where clients, or advisors, can access multiple different functions. Set app preferences, access files and disclosures, and even submit feedback. Each function is explained below:

a) Clients with related households (additional profiles in the Manage Users app) can switch between households and navigate to another profile by clicking the name at the top of the menu tab.

b) **Document Vault** allows you to view documents within the value, create new folders for documents and upload files or photos directly from your phone.

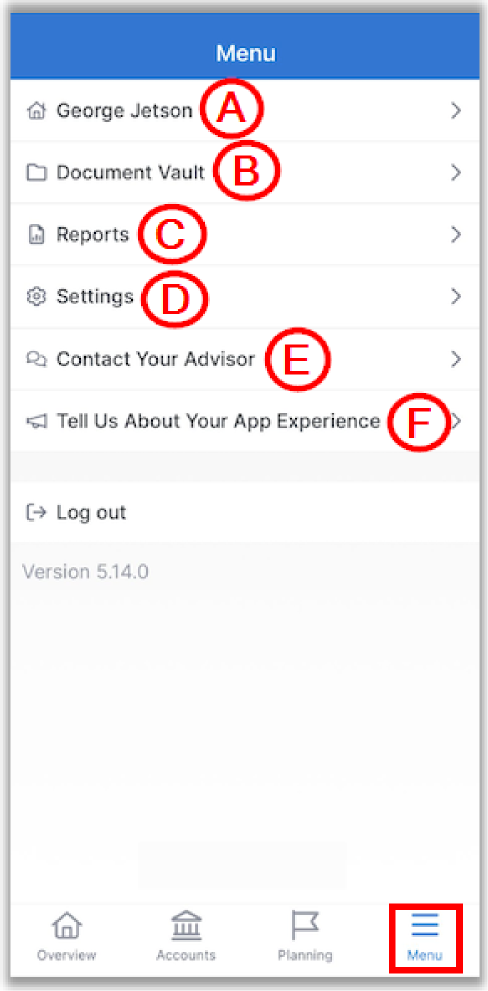
c) **Reports** allow you to run Portfolio Reports and download them to your phone.

d) Under **Settings** - Enable biometrics, reset your password, review the disclosures, terms of service, and privacy policy.

e) **Contact Your Advisor** allows you to integrate your online scheduling link for clients to quickly get in touch with you.

f) Send Feedback by selecting **Tell Us About Your App Experience**. Add a screenshot to provide the service team with a visual example.

NOTE: The feedback area is not intended to communicate with your firm. Clients <u>should not</u> include any personal identification information in the feedback message.



Additional Issues

If you have any 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.