Orion Advisor Client Portal

The Orion Advisor Client Portal allows you to view your Schneider Downs Wealth Management accounts, as well as those outside accounts (bank and liability accounts) that you've linked to your portal, all in one place. We'll also be uploading your quarterly reports, invoices and other account-related documents to this space, giving you more timely and secure document delivery. Shown below are the simple steps to set up your own personal client portal. You can still get account statements and tax reporting documents from your custodian's website, but Orion will provide consolidated information and reporting for all of your accounts.

- Go to: https://login.orionadvisor.com/
- Click the "Create Login" link on lower right. This will open the window shown on the right which will ask you to create a username.
- Please use your email address as your username.
- Enter your Social Security number or tax ID number. The Social Security or Tax ID is the main number associated with the household or the first named partner in the case of a joint account. Enter either type of number using **XXX-XX-XXXX** format.
- Enter a Date of Birth formatted **MM/DD/YYYY**. In the case of an entity or trust, enter 12/31/1900 for the Date of Birth.
- Create a security question and answer.
- Don't forget to click the "I am not a robot" checkbox.
- Finish by clicking "Create Login."

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You need not worry about entering identifying information during this process. The Orion portal is a secure site and the information is not stored in the portal, this is only a match for verification.

If you need assistance, please contact Karen Werley at 412-697-5331 or kwerley@schneiderdowns.com. She can reset passwords, reactivate logins, and walk you through the various pages of your personalized portal.