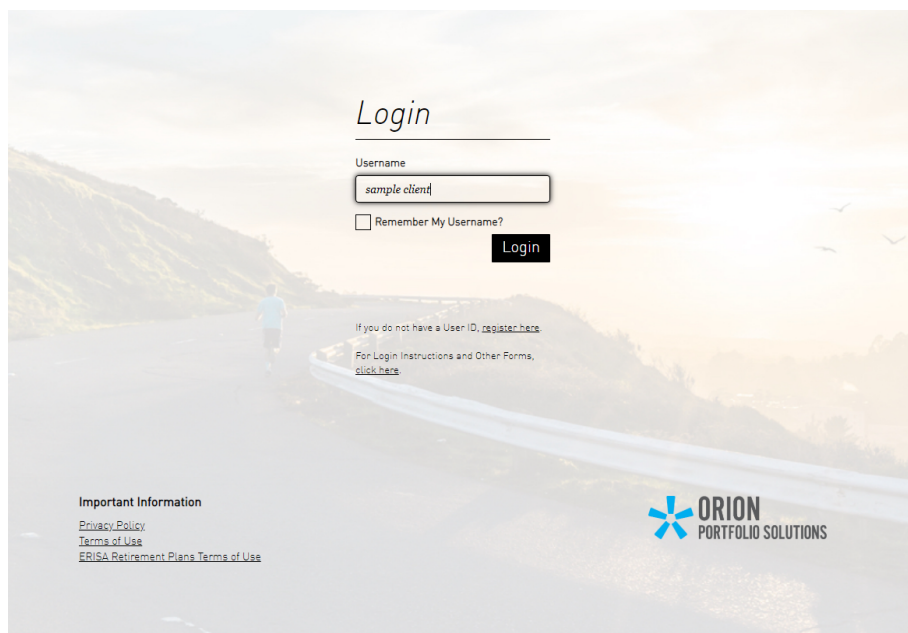Dear Client,

Thank you for choosing Orion Portfolio Solutions. In keeping with our mission to provide unparalleled service to both advisors and their client, we welcome the opportunity to assist you. Please feel free to call upon us at any time by dialing 800.379.2513.
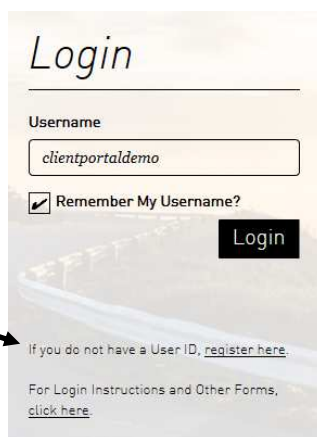
We appreciate your business!

Orion Portfolio Solutions, LLC
2300 Litton Lane, Suite 102
Hebron, KY 41048
Phone: 800-379-2513
Fax: 859-426-2050

Login

Username

sample client

☐ Remember My Username?

Login

If you do not have a User ID, register here.

For Login Instructions and Other Forms,
click here.

Important Information
Privacy Policy
Terms of Use
ERISA Retirement Plans Terms of Use

To access your account:

1. Type the below website address in the address bar of your internet browser: www.portfoliologin.com

2. If you know your credentials, type in your username and click **Login**. Confirm your identity with the security image verification and type in your password* to confirm. Click **Continue**.

If this is your first time logging in, click "Register Here" directly under the Login button. You will then be prompted to enter your Account Number and Social Security Number.
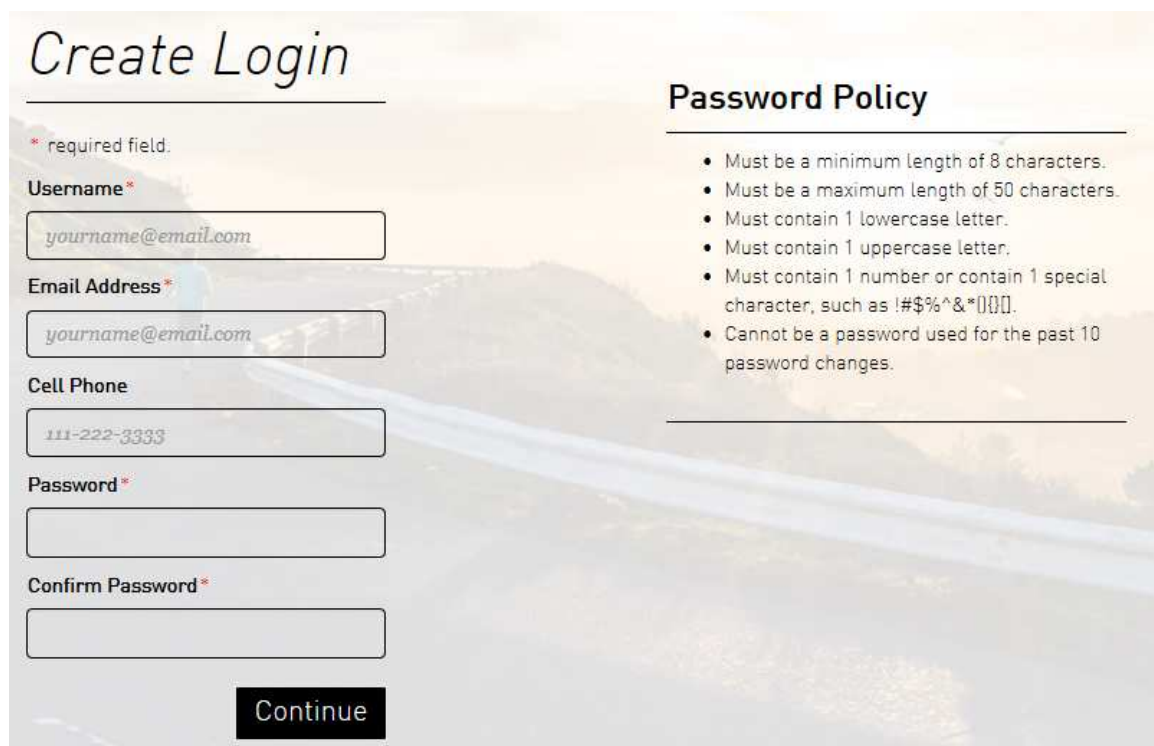
Login

Username

clientportaldemo

☑ Remember My Username?

Login

If you do not have a User ID, register here.

For Login Instructions and Other Forms, click here.

Confirm Identity

Please confirm that your Image, Phrase and Username are correct. If so, enter your password to continue.

Image

Phrase   talk like a pirate
Username   rds\jacquie.webb
Password

Reset Password?   Continue

NOTE: If your phrase and picture are NOT recognized, you are not on the valid site.

3. Once the system confirms your account you will need to create login credentials*. The Username does not have to be your email, however, we recommend using your email. The phone number is optional; it is simply another method to verify your account. Click **Continue**
   * please note the password policy requirements.

Create Login

* required field.

Username *

yourname@email.com

Email Address *

yourname@email.com

Cell Phone

111-222-3333

Password *

Confirm Password *

Continue

Password Policy

- Must be a minimum length of 8 characters.
- Must be a maximum length of 50 characters.
- Must contain 1 lowercase letter.
- Must contain 1 uppercase letter.
- Must contain 1 number or contain 1 special character, such as !#$%^&*{}[].
- Cannot be a password used for the past 10 password changes.

4. Next, you will be directed to the Security page. The username and email will automatically populate. Enter a security phrase you will remember and choose a security image. Cell Phone is optional, but would only be used as an additional method to verify your identity upon login. **Click Confirm**. **Be sure to select Trusted Device. Otherwise you will have to verify your account each time you log in.**

5. **Choose your verification method**. Verify your account via email or by mobile phone (if you provided). **Click Send.**

Enter the confirmation code upon receipt and **click Submit**.

You should now have a login and will be redirected to your Portfolio Dashboard.

To Reset Your Password:

Note: There is no way to reset a username. Please contact the OPS Client Services Team for assistance.

1. At the login page, type in your username and **click Login.**

2. When asked for a password, click the "**Reset Password**" just left of the Continue button.

3. **Type in your Username and click Continue**.

4. It will then prompt you to **select a method of verification** that you previously provided us with. Choose either Email or Phone (if applicable).

Confirm Identity

Please confirm that your Image, Phrase and Username are correct. If so, enter your password to continue.
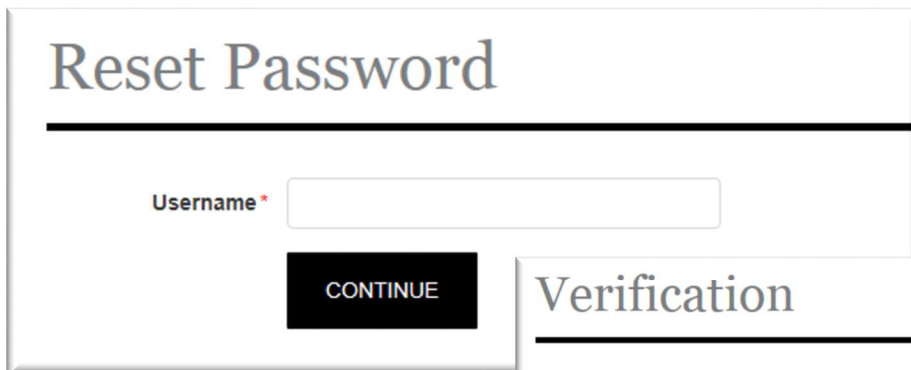
Image

Phrase   talk like a pirate

Username   rds\jacquie.webb

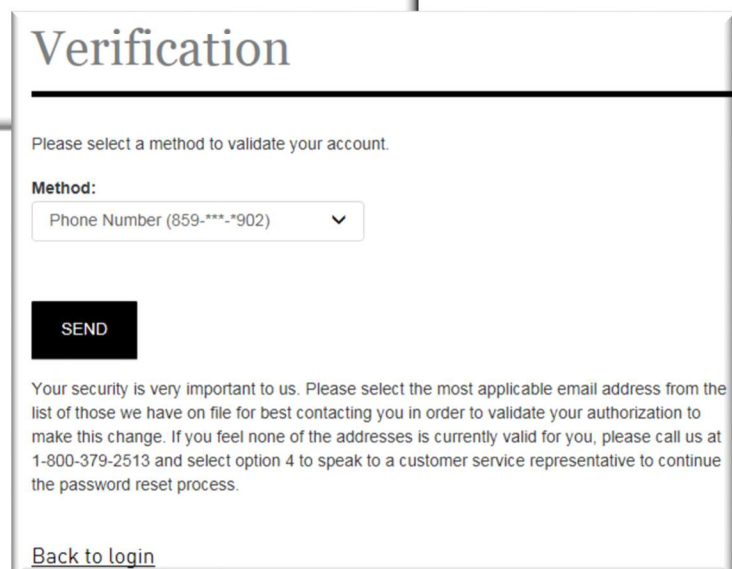**Password**

Reset Password?   Continue

NOTE: If your phrase and picture are NOT recognized, you are not on the valid site.

Reset Password

Username *

CONTINUE

Verification

Please select a method to validate your account.

Method:

Phone Number (859-***-*902)

SEND

Your security is very important to us. Please select the most applicable email address from the list of those we have on file for best contacting you in order to validate your authorization to make this change. If you feel none of the addresses is currently valid for you, please call us at 1-800-379-2513 and select option 4 to speak to a customer service representative to continue the password reset process.

Back to login

To Reset Your Password (cont):

5. **Enter the Confirmation Code** upon receipt and **click Submit**.

Confirmation

Please enter the confirmation code below to continue, the code will expire in 15 minutes.

Confirmation Code *

[   ]

SUBMIT   Return to Login

6. **Enter in a new password**, following the password policy requirements. **Click Reset.**

Reset Password

Email Address	asdfafadf@gmail.com
New Password *	[ ]
Confirm Password *	[ ]
RESET	

Password Policy

- Must be a minimum length of 8 characters.
- Must be a maximum length of 50 characters.
- Must contain 1 lowercase letter.
- Must contain 1 uppercase letter.
- Must contain 1 number or contain 1 special character, such as !#$% ^&*(){}[]_.
- Cannot be a password used for the past 10 password changes.

7. Success! Your password should now be reset. **Select "Click here" to go back to the login**.

Password Reset Complete

Your password has been reset successfully.

Click here to login

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