How to Get Started With the New Orion Client Portal

Each day, people find themselves mulling over thousands of thoughts and questions. *What should I make for dinner? When should I tackle this project? How can I get around this traffic? Did I remember to lock the front door?*

At Orion, we make sure to not add to the laundry list of concerns. With our newly improved Client Portal, we help provide your clients with a one-stop experience, so they never have to face an overwhelming number of personal financial management portal options. Instead, clients can access everything they need through a single portal for a complete picture of their financial lives. They'll always know where their accounts are, how they are performing, and most importantly, how they are progressing towards their financial goals—without a question.

The upgraded, redesigned tool fuses our legacy client portal with the client portal available through Orion Planning platform (formerly known as Advizr) for a seamless experience. Clients can aggregate their accounts when needed, view important investment data, automate account openings, and store essential documents without having to work out of various systems.

This direct process will give you a leg up, too. You can begin increasing revenue, enhance your client engagement, and improve your clients' overall experience. To transition to the new Orion Client Portal today, follow these five simple steps:

Step One: Contact Our Support Team

If you haven't already set yourself up in the Orion Planning Platform, contact our Support Team who will help get you signed up today. Our team will grant you access to the platform and help get you acquainted quickly, answering any questions you may have during the process. You can also reference our FAQ, available here, for additional assistance.

Step Two: Share the Exciting News

Now is a great time to reach out to your clients to let them know that their online portal experience is about to get even better. We created several pre-built client communication templates your team can leverage as you connect with them. To help make your outreach process easier and more effective, we also developed several customizable fact sheets, presentations, and email announcements that are editable to fit your needs. Check them out here.

Step Three: Connect Your Clients

To officially transition all your clients onto the new portal, reconnect with our Planning Support Team, who will do all the work behind the scenes, using a redirect we built into the system. That way, once your team is ready to "flip the switch," all your clients will be redirected to the new portal using their original login and credentials as before. They will be able to locate their investment data, documents, and account balances—all in one place.

Step Four: Customize Your Clients' Portals

Now is a great time to get your clients settled before they're exploring the portal themselves by choosing what they have access to. Simply click on your client's name at the top left-hand corner of their plan, then select "Configure Access" at the very top of the dropdown menu. From there, you can toggle what they can or cannot specifically access, such as their current finances, financial plan, profile, documents, assistance from an advisor, and credit monitoring.

After determining the configuration of the portal for your client, be sure to review the settings you've applied. Click on the "Preview Client Portal" link, which can be found at the bottom of the "Configure Access" page. The link will provide a preview of your client's experience, displaying exactly what they will see when they log in.

Step Five: Encourage Portal Onboarding

Before your clients can begin reviewing their plans, they will need to complete onboarding, which requires each of them to input data for a specific goal you select. To get this process started, visit the "Configure Access" page of their profile and toggle on the "Onboarding" selection, then choose which goal you would like your clients to fill out, such as retirement workflow or comprehensive workflow. When your clients first log on, they will be required to enter the necessary information to move forward.

Once they input their data, turn off the onboarding feature, so your clients can jump right into their dashboard for a review of their financial planning of performance data. Keep in mind, if the onboarding toggle is accidentally left on, they will always be taken to a data entry area upon logging in.

Experience a Stronger Advisor-Client Relationship

Engaged clients are happy, loyal clients. With the new client portal at their fingertips, your clients are empowered to always stay invested in their journey toward financial wellness.

Within the portal, clients can view financial planning and portfolio data side-by-side, helping to draw the valuable connection between progress toward goals and investment strategy. Video chat, co-browsing, and screen sharing services offered through the portal make it easy for you and your clients to stay in touch—and, ultimately, collaborate together.

As a comprehensive, modern, and intuitive tool, the new client portal does more than enhance the client experience: it seamlessly places you at the center of your clients' financial well-being.

Do you want to strengthen your client relationships and get involved in their financial well-being? Click here to contact our support team and get started in our

Orion Client Portal today!

If you’re interested in our portal but not yet working with Orion, let’s talk. Click here to schedule a demo with our team. We can’t wait to help you!

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