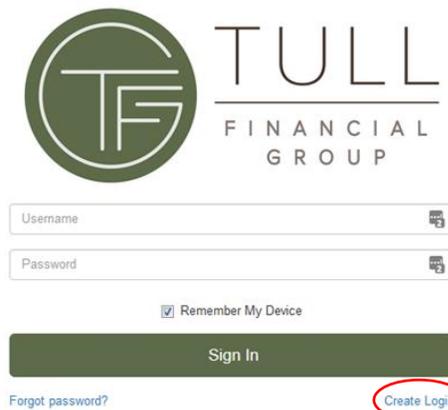


Tull Financial Group's secure **Client Portal**, powered by a third-party: Orion Advisor Services, allows you to conveniently view account balances, upload important documents, create a snapshot of your holistic net-worth, and collaborate with the TFG team. You can view and print your quarterly reports anytime, read recent commentary, and enable two-factor authentication for additional security.

Check out our [Client Portal Overview](#) document for a quick tour of the new portal and its features, or call our office at (757) 436-1122 to have a team member walk you through your portal.

Creating your new Client Portal login:

- Visit our website (www.tullfinancial.com) and click on the gold “Client Login” button at the top right of the page. Or you can use the following link to take you directly to the login page: <https://login.orionadvisor.com/login.html?g=52d7dcfd-cbab-474b-a70f-f599d1c5c18e>.
**TIP: Add this link to your browser's favorites tab or bookmarks bar/menu so that you can access it again with just a click.*



- Click on the “**Create Login**” link, located below the lower right of the Sign In button. *Please note: former ClientView Live users will need to create a new login.*
- Enter your email address as your **username**.
- Enter the primary **Social Security Number or Tax ID** number associated with your household using XXX-XX-XXXX format.
- Enter the **Date of Birth** associated with the primary Social Security Number using MM/DD/YYYY format. In the case of an Entity, enter 12/31/1900 for the Date of Birth.
- Create Security Question and Answer. *See page two for tips to create a security question.*
- Click the “I am not a robot” checkbox.
- Click “Create Login.”
- You will receive an e-mail from NoReply@orionadvisor.com with a link to establish your password. The link will expire in 15 minutes.

The Client Portal is a secure site and the information used to create your login is not stored in the portal – it is only a match for verification.

Please contact our office at (757) 436-1122 if you have any questions.

Tips to create a safe and secure security question:

- **Don't use identifiable information** (i.e. your social security number, birthplace, date of birth, etc.)
- **Hard to guess** – use information that would be unique to you, but hard for others to guess
- **Easy to remember** – use short and simple answers
- **Does not change** – pick a question that stays the same over time, like something from the past
- **Spell and capitalize correctly**

Example Security Questions:

- Favorite drink
- Where did you and your spouse meet?
- Favorite vacation spot
- First pet
- What was the first car you owned?
- Favorite teacher

Creating logins for additional account holders:

- To create an additional login, **you will need to have access to the email address used to create the first login for your household.** This is a security measure to notify you if someone is creating a login for your accounts.
- Follow the steps on page one.
- Enter the additional user's email address as the **username.**
- The email address used to create your first login will receive an email from NoReply@orionadvisor.com with a link to establish the password for the additional user. This link will expire in 15 minutes.
- If you do not have access to the email address, ask the email account owner to forward you the verification email when received.

Other helpful tips:

- Clients with active logins can click on "Forgot Password" via the Client Portal login page to reset passwords.
- You will be prompted to change your password every 90 days.
- Please note that user IDs and logins will timeout after 180 days of no activity. We recognize this is frustrating, however, because of the confidential nature of the information, Orion has put this safeguard in place for your protection. Call our office at (757) 436-1122 and a team member will be happy to reactivate your login.