2022 Instructions for Performance and Billing Statements on Orion Client Webportal
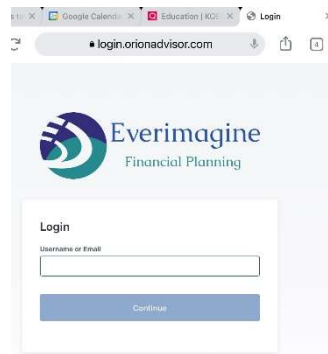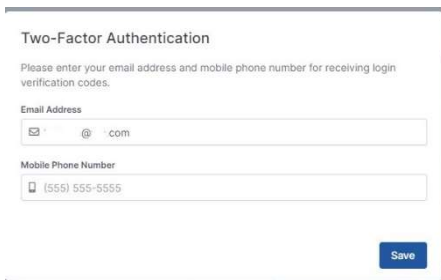
- Browse to the Orion Client Webportal: https://login.orionadvisor.com/login.html
- You will see this:

- Enter your email address and tap continue.

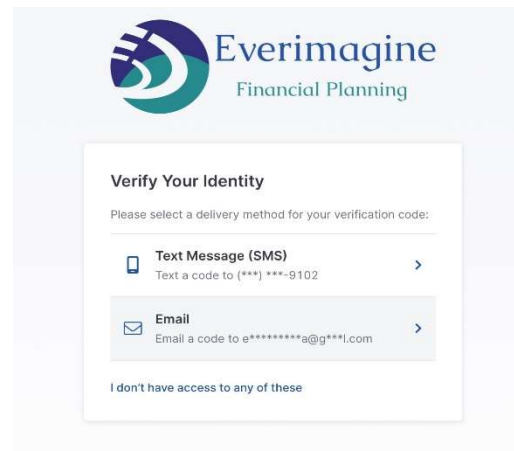- • Enter your password, tap Log in

- For extra security, 2-Factor Authentication has been added. A screen showing your email address and your mobile phone, if one is in your record, appears. It looks like this:

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  - Verify, revise, or add the correct information for your email and mobile phone because this information will be used to authorize your identity

- Tap Save after verifying or correcting the data.

- The login process will repeat starting with entering your email address and password, but then showing you the 2-Factor Authentication screen. It looks like this:

- Select the method – text or email – you wish to receive the authentication code. Once selected, the code is sent automatically.

- This screen appears next:

- Enter the code sent to your phone or your email and tap verify.
- You will be brought to the home page.

- It will take time to load the data for your account, but you'll be brought to the Overview page of your account. The page will look like this:
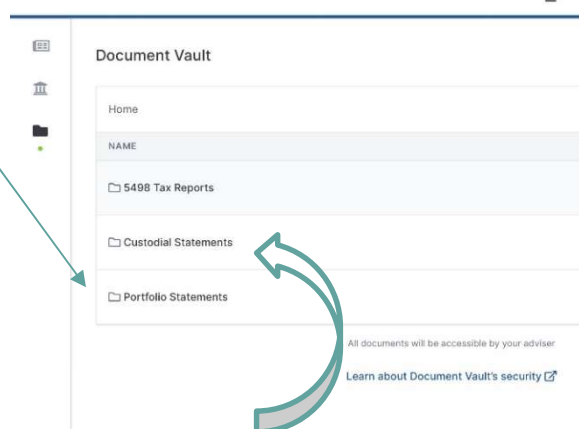

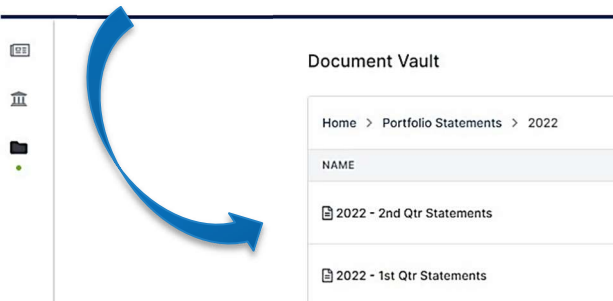This overview page is shown when the Temple Icon is selected. It is the middle icon in the bar on the left.

- To get the Performance and Billing Statements, select the Documents tab - the file folder icon – bottom icon.

- You will see the Document Vault Home page. It looks like this:

- Select the Portfolio Statements to see menu for your statements. The Performance and Billing Statement will be listed by the Year and the Quarter.

- Click on the current report to download a copy to review and save for your records – see blue arrow below.

- Click here on "Custodial Statements" to retrieve your TD Ameritrade Statements.