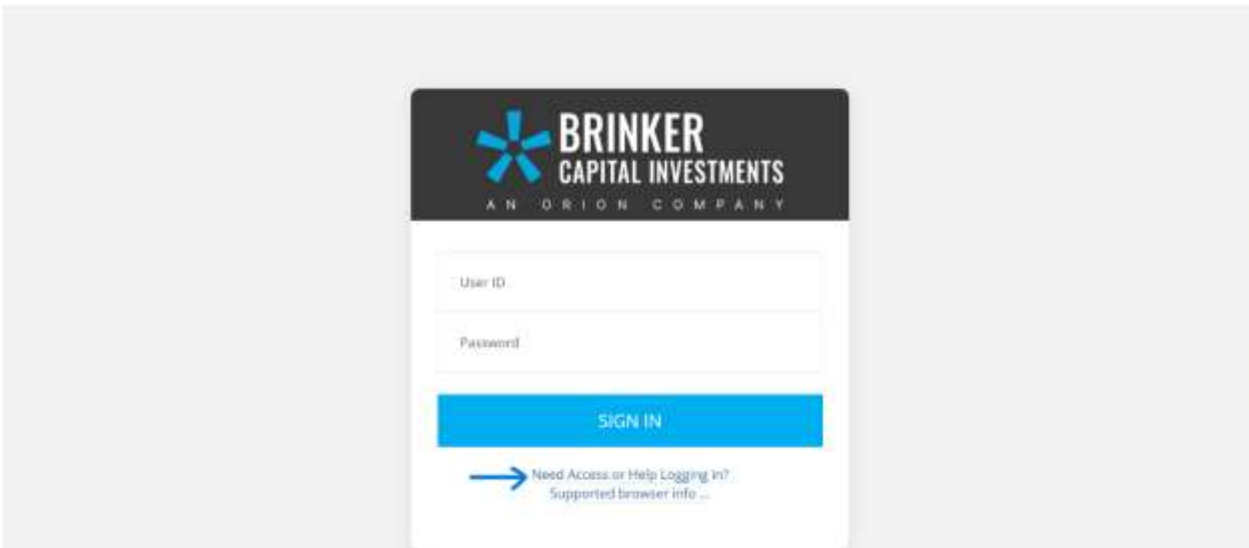
Brinker Capital Client Portal How-To-Guide

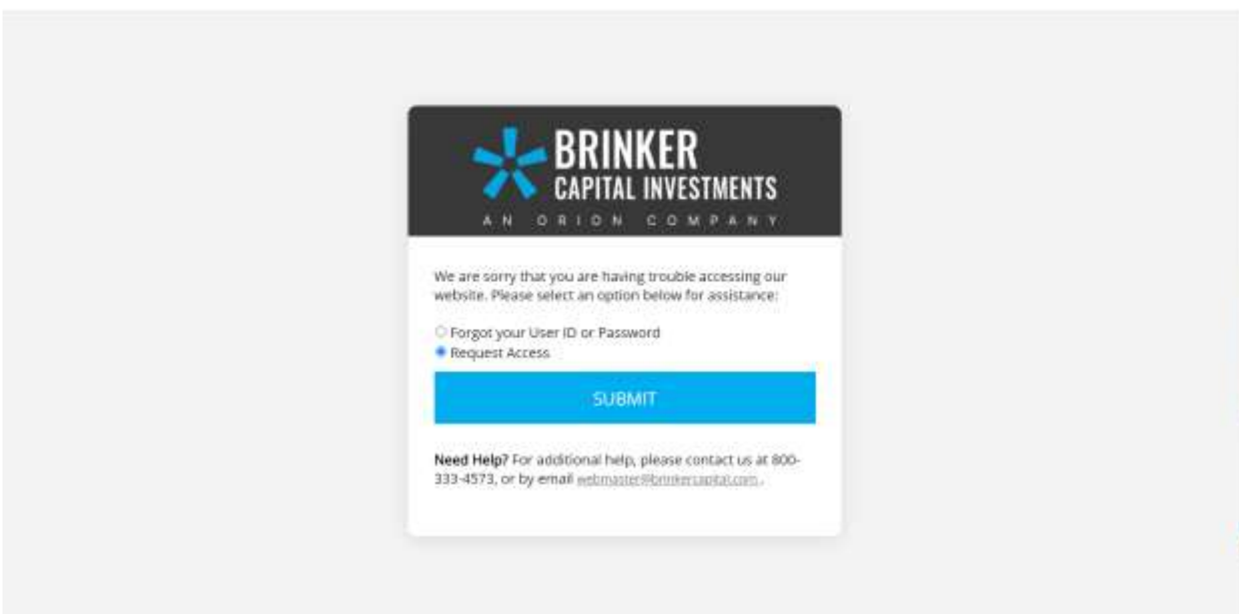
Step 1. Navigate to orion.com

Step 2. Click on login tab and navigate to brinker capital, then proceed to click on client portal (brinker)

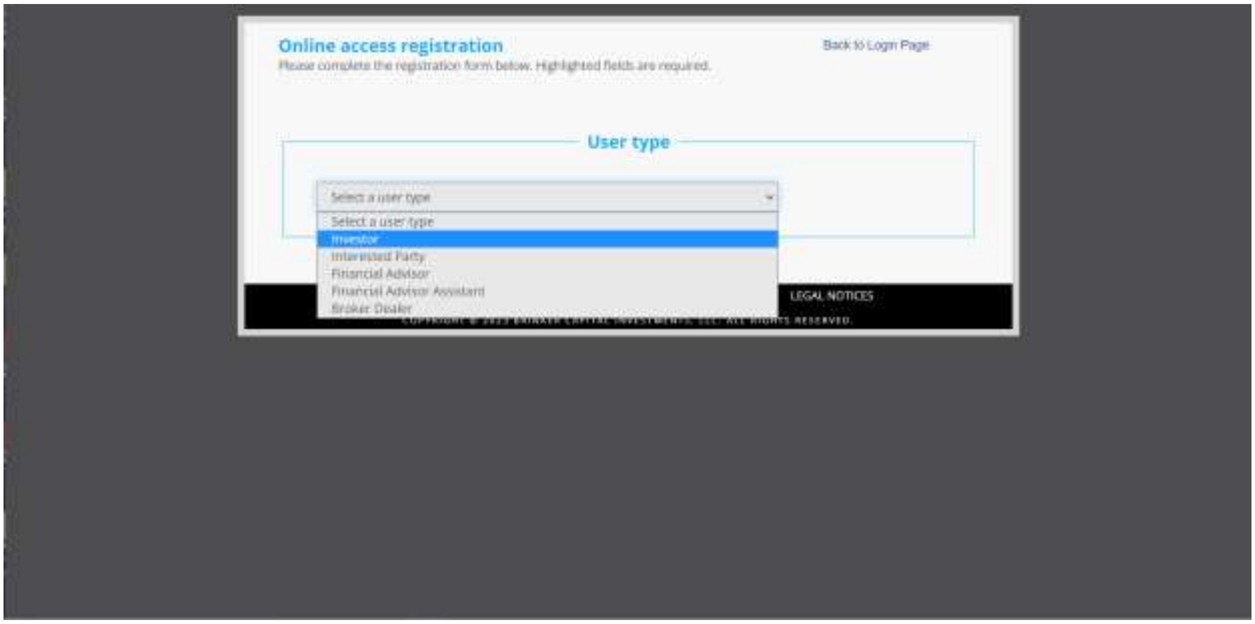
Step 3. Click on Need Access



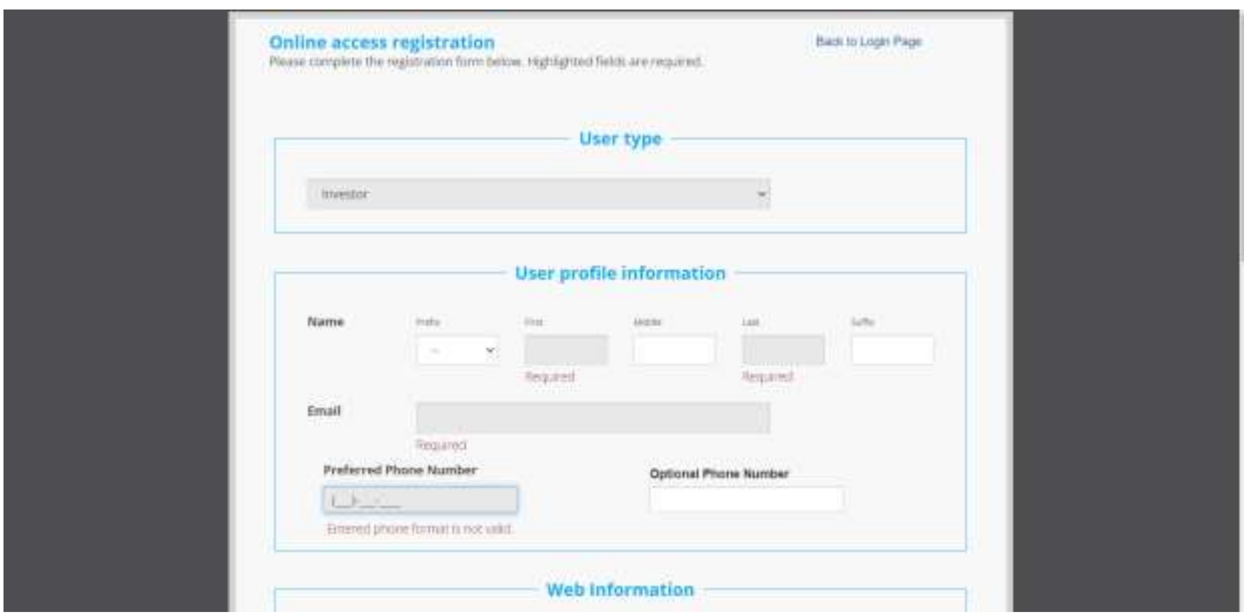
Step 4. Click on request access



Step 5. For user type select, “investor”



Step 6. Follow prompts to enter personal information including setting up a username and password



*Note: you will need your account number to complete this step, registration is simply the type of account you have (example: John Growmoney IRA, TOD, Taxable) The account number is most important here and the exact registration naming is not required

Step 7. You will land on the client portal homepage. From the left column you can navigate to the features and track performance, create reports, and upload documents in the document center