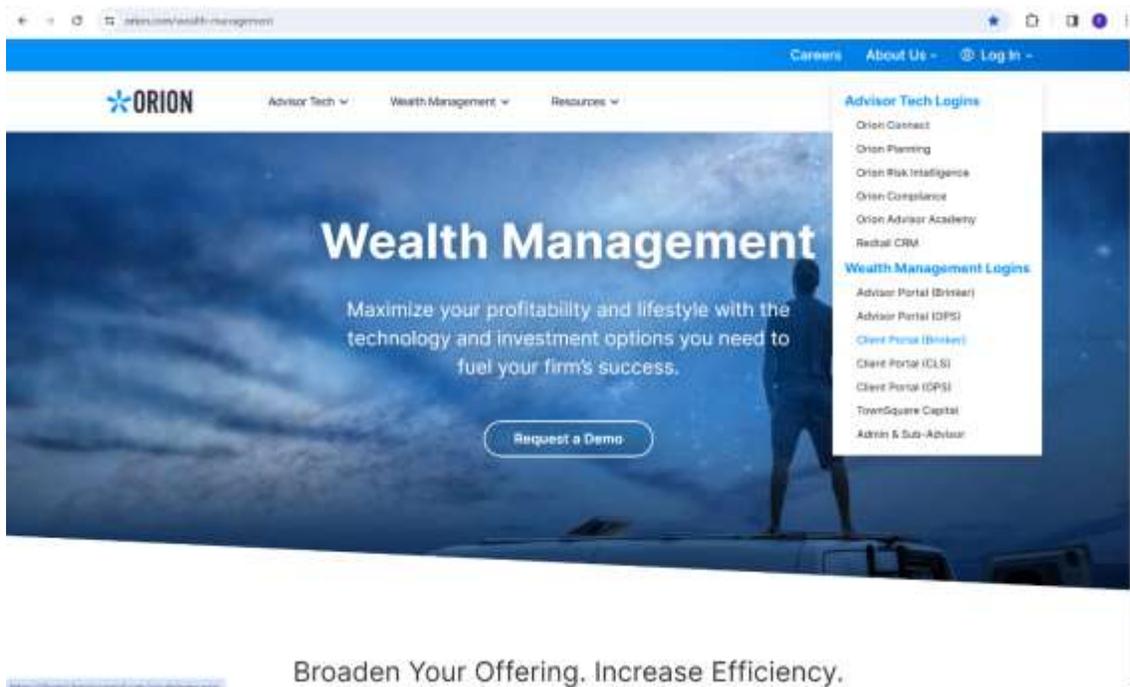


Brinker Capital Client Portal How-To-Guide

Step 1. Navigate to orion.com

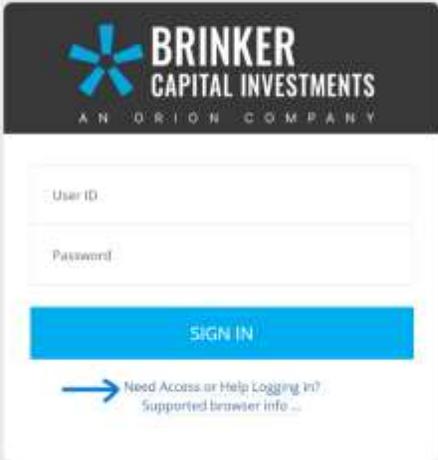


Step 2. Click on login tab and navigate to brinker capital, then proceed to click on client portal (brinker)



Broaden Your Offering. Increase Efficiency.

Step 3. Click on Need Access



BRINKER
CAPITAL INVESTMENTS
AN ORION COMPANY

User ID

Password

SIGN IN

→ Need Access or Help Logging in?
[Supported browser info ...](#)

Step 4. Click on request access



BRINKER
CAPITAL INVESTMENTS
AN ORION COMPANY

We are sorry that you are having trouble accessing our website. Please select an option below for assistance:

Forgot your User ID or Password

Request Access

SUBMIT

Need Help? For additional help, please contact us at 800-333-4573, or by email webmaster@brinkercapital.com.

Step 5. For user type select, "investor"

The screenshot shows the 'Online access registration' page. At the top, it says 'Please complete the registration form below. Highlighted fields are required.' and 'Back to Login Page'. The 'User type' section has a dropdown menu with the following options: 'Select a user type', 'Investor', 'Interested Party', 'Financial Advisor', 'Financial Advisor Assistant', and 'Broker Dealer'. The 'Investor' option is highlighted in blue. At the bottom of the form, there is a 'LEGAL NOTICES' link and a copyright notice: 'COPYRIGHT © 2022 ENVIRO CAPITAL INVESTMENTS LLC. ALL RIGHTS RESERVED.'

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

The screenshot shows the 'Online access registration' page with the 'User profile information' section. The 'User type' dropdown is set to 'Investor'. The 'User profile information' section includes the following fields: 'Name' (split into First, Middle, Last, and Suffix), 'Email', 'Preferred Phone Number', and 'Optional Phone Number'. The 'Preferred Phone Number' field has a red error message: 'Entered phone format is not valid.' The 'Web information' section is partially visible at the bottom.

*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

