

Technology Integration: Orion

Enhanced API Integration

A streamlined client experience is now available through a data-driven partnership between Liberty and Orion.

With this enhanced API integration, advisors and their clients will now have on-demand access to statements and tax documents within Orion's Client Presentation tool. Providing access to important documents in Orion eliminates the need for users to access multiple applications and creates a better client experience.

Application Program Interfaces (APIs) can add scalability, reduce time to market, and save resources while providing integration with the latest technology. For more information on our technology integrations, please contact your Client Service Advocate.

Orion Integration Setup

In the Orion System, go to Settings.

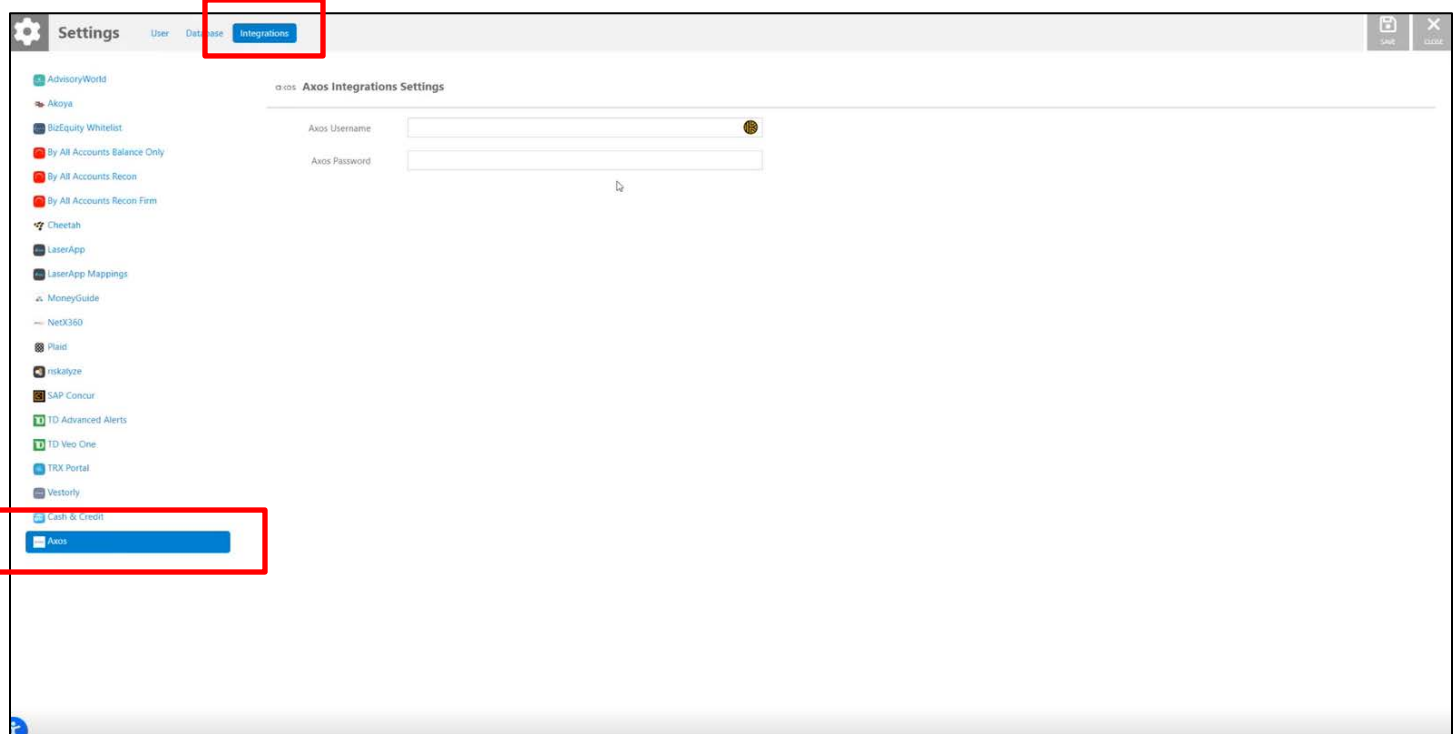
The screenshot displays the Orion client portal interface. The top navigation bar includes a search bar, user profile (Daniel Nauman), and various utility icons. A sidebar on the left lists navigation options like Portfolio Audit, Advisory Fee Rep..., and Client Experience. The main content area is divided into several sections:

- AUM Summary:** Shows a total market value of \$498.83 M as of 4/20/2024, with a line chart showing historical trends and a table for Managed vs. Unmanaged assets.
- Portfolio Allocation:** A horizontal bar chart and table showing the distribution of assets across various household members and categories.
- Transactions:** Shows a total transaction value of \$58.25 M, with a table detailing transaction types like Contributions, Distributions, and Merge Out.
- Asset Category Allocation:** A horizontal bar chart and table showing the breakdown of assets into categories like Equity, Fixed Income, and Money Market.
- Asset Class Allocation:** A horizontal bar chart and table showing the breakdown of assets into classes like Common Stock, Large Blend, and Offshore Fund.
- New Accounts in Last 90 Days:** A summary showing 90 new accounts, 88 pending, and \$131.78 K in new money available, with a table listing individual accounts.

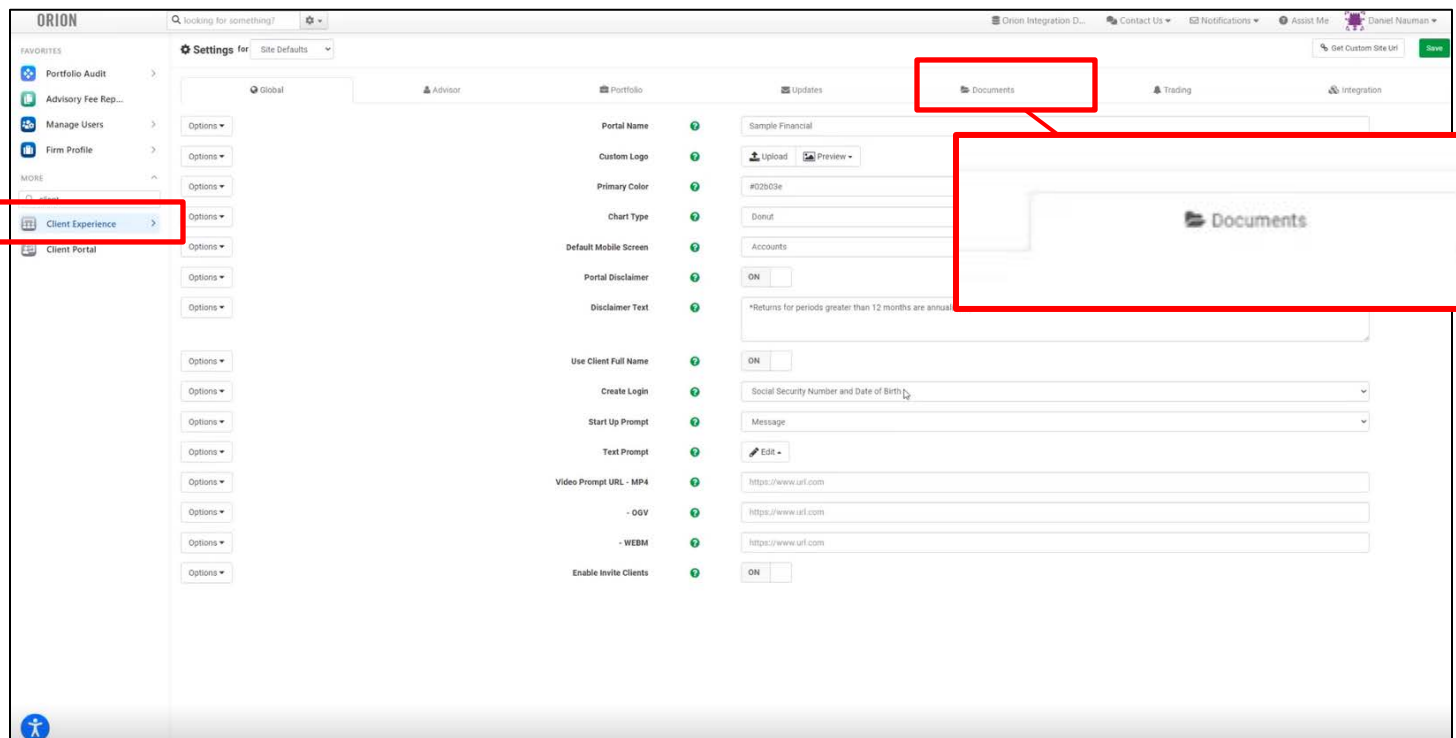
A red box highlights the 'Settings' option in the user profile dropdown menu in the top right corner.

Select the Integrations tab and locate Axos.

Enter your Axos Advisor Services Liberty credentials, and click Save.

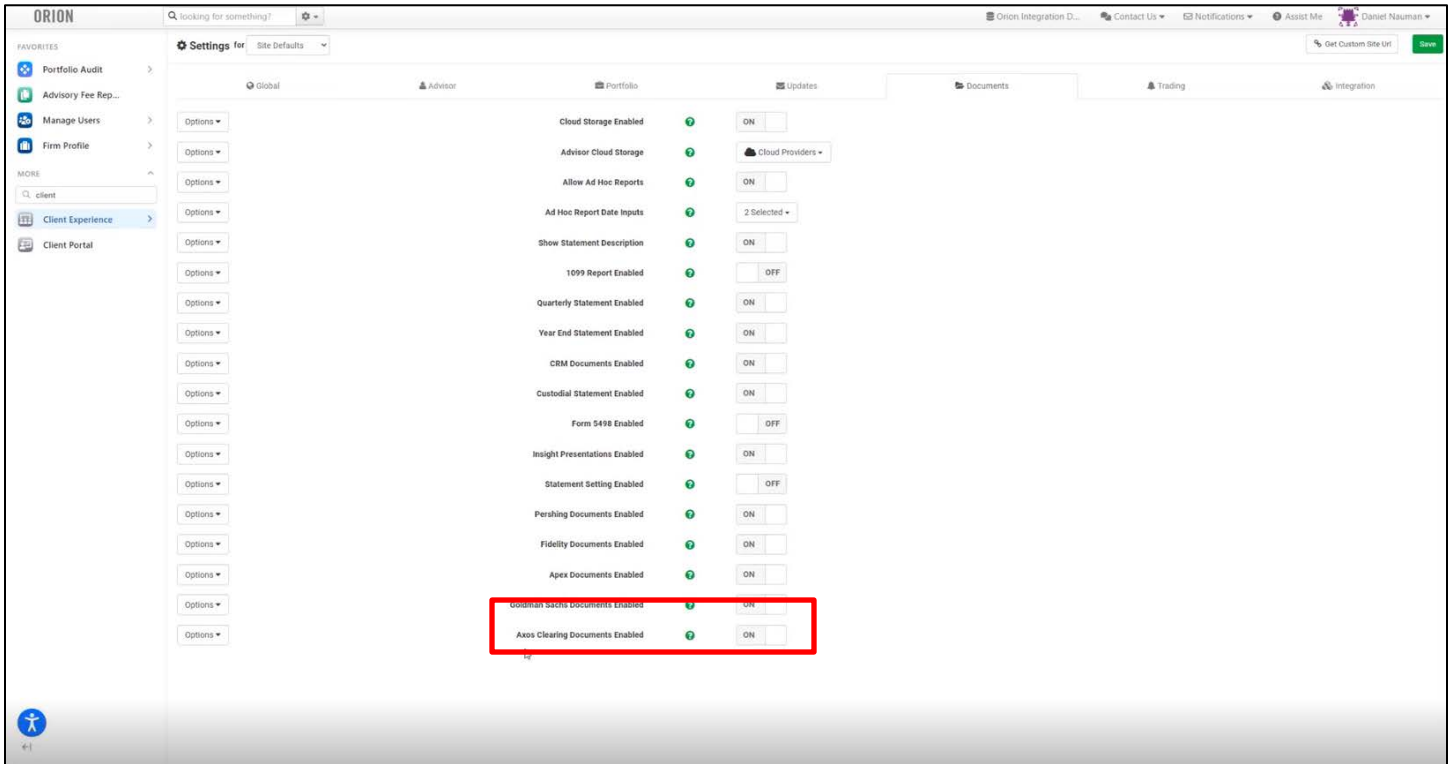


To turn on documents, navigate to the Client Experience Settings section and then, the Document tab at the top.



On the Documents tab, you will need to turn on the “Axos Advisor Services Documents Enabled” toggle switch.

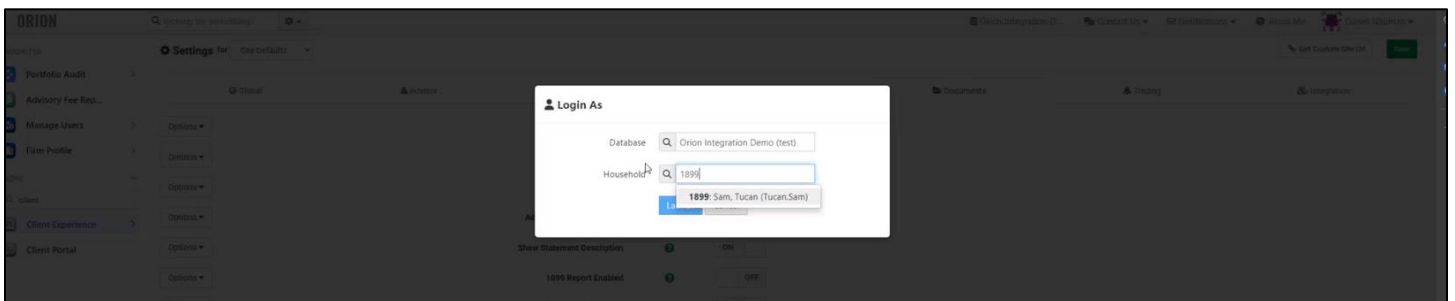
Once enabled, the setup is complete.



Accessing Client Statements and Tax Documents

To access Client Statements and Documents, you need to access the Orion Client Portal.

Enter the client Household (account number) to access the client’s documents.



Once in the client's account, select Document Vault on the left-hand navigation bar.

The screenshot shows a client's account dashboard. On the left-hand navigation bar, the 'Document Vault' option is highlighted with a red box. A callout box also points to this option. The main dashboard displays 'Net Worth \$2,000' and a circular chart showing 'ASSETS \$2,000' with 'Savings & investments 100%'. Below the chart is a table with columns 'TUCAN' and 'TOTAL'.

	TUCAN	TOTAL
Assets	\$2,000	\$2,000
+ SAVINGS & INVESTMENTS	\$2,000	\$2,000
Liabilities	-	-
Net Worth	\$2,000	\$2,000

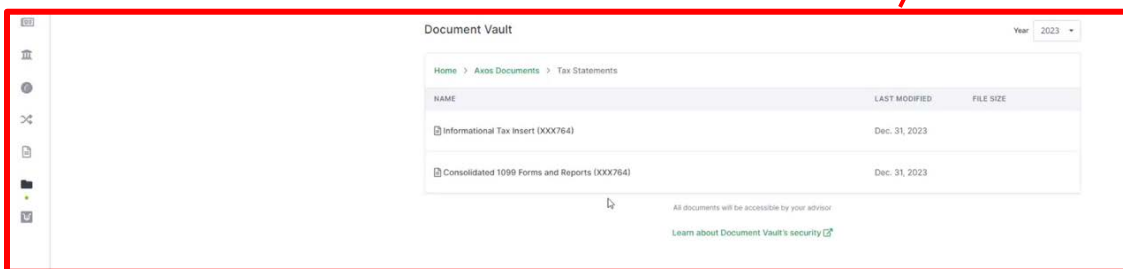
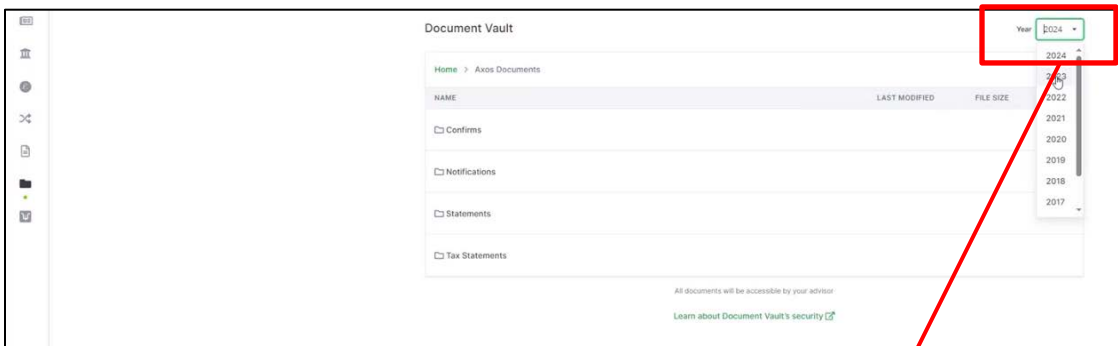
Select Axos Documents to display the Documents folder.

The screenshot shows the 'Document Vault' interface. A table lists folders: 'Home', 'Advisor Shared', and 'Axos Documents'. The 'Axos Documents' folder is highlighted with a red box and a mouse cursor. Below the table, there is a note: 'All documents will be accessible by your advisor' and a link 'Learn about Document Vault's security'.

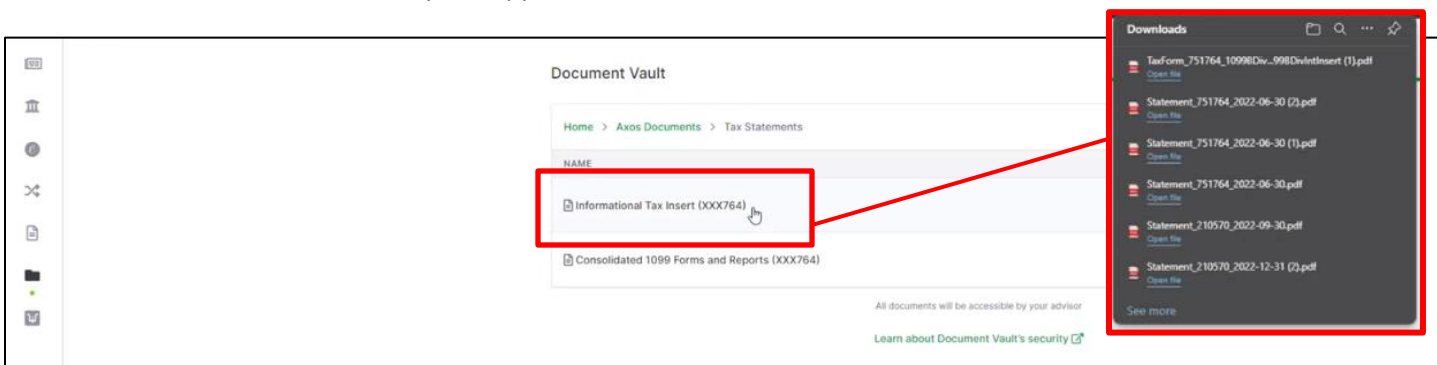
The screenshot shows the 'Document Vault' interface with the 'Axos Documents' folder selected. The breadcrumb path is 'Home > Axos Documents'. A table lists documents: 'Confirms', 'Notifications', 'Statements', and 'Tax Statements'. Below the table, there is a note: 'All documents will be accessible by your advisor' and a link 'Learn about Document Vault's security'.

Documents are sorted by year.

Select the year needed to display all statements, tax documents, and other available documents.



Once the document is selected, they will appear in the downloads.



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