axos ADVISOR SERVICES

Technology Integration: Orion

Enhanced API Integration

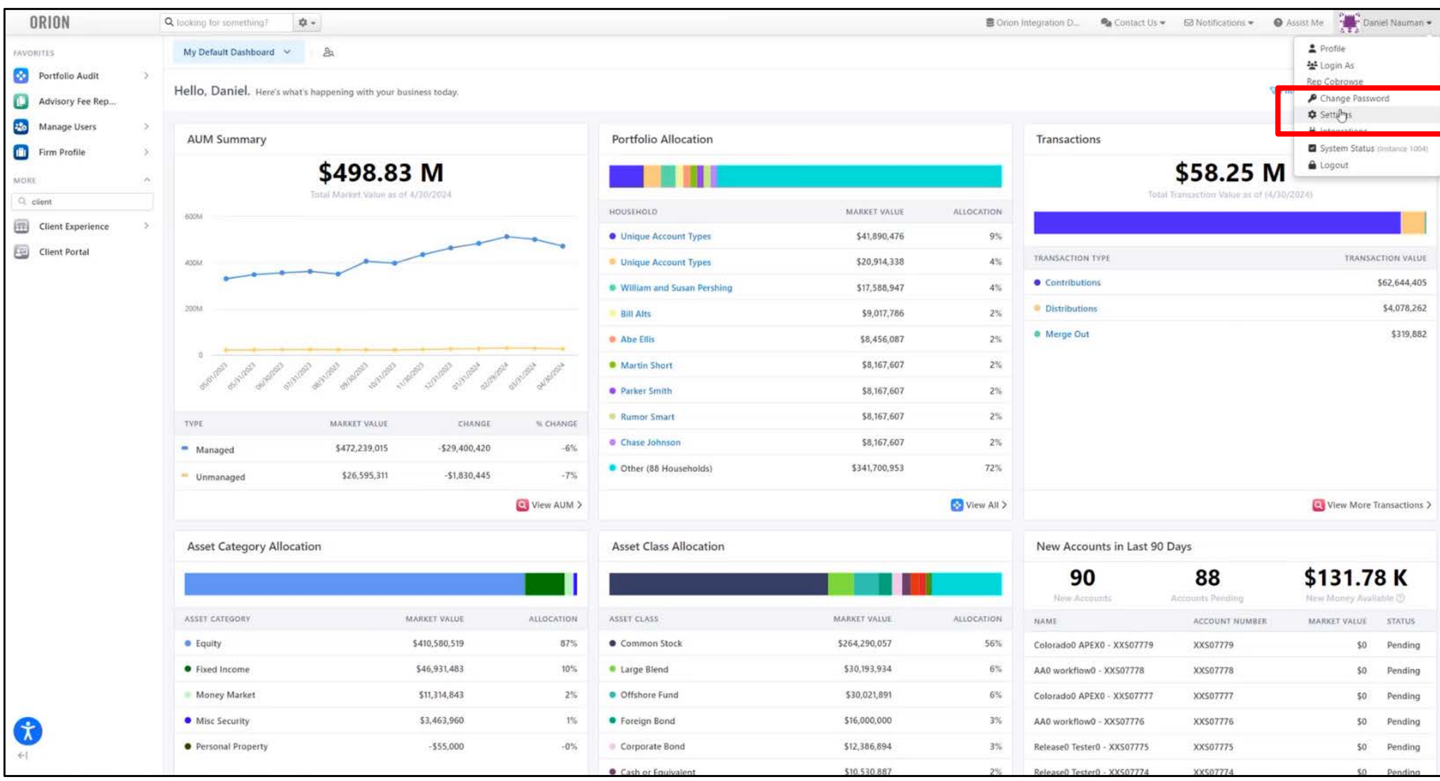
A streamlined client experience is now available through a data-driven partnership between Liberty and Orion.

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.

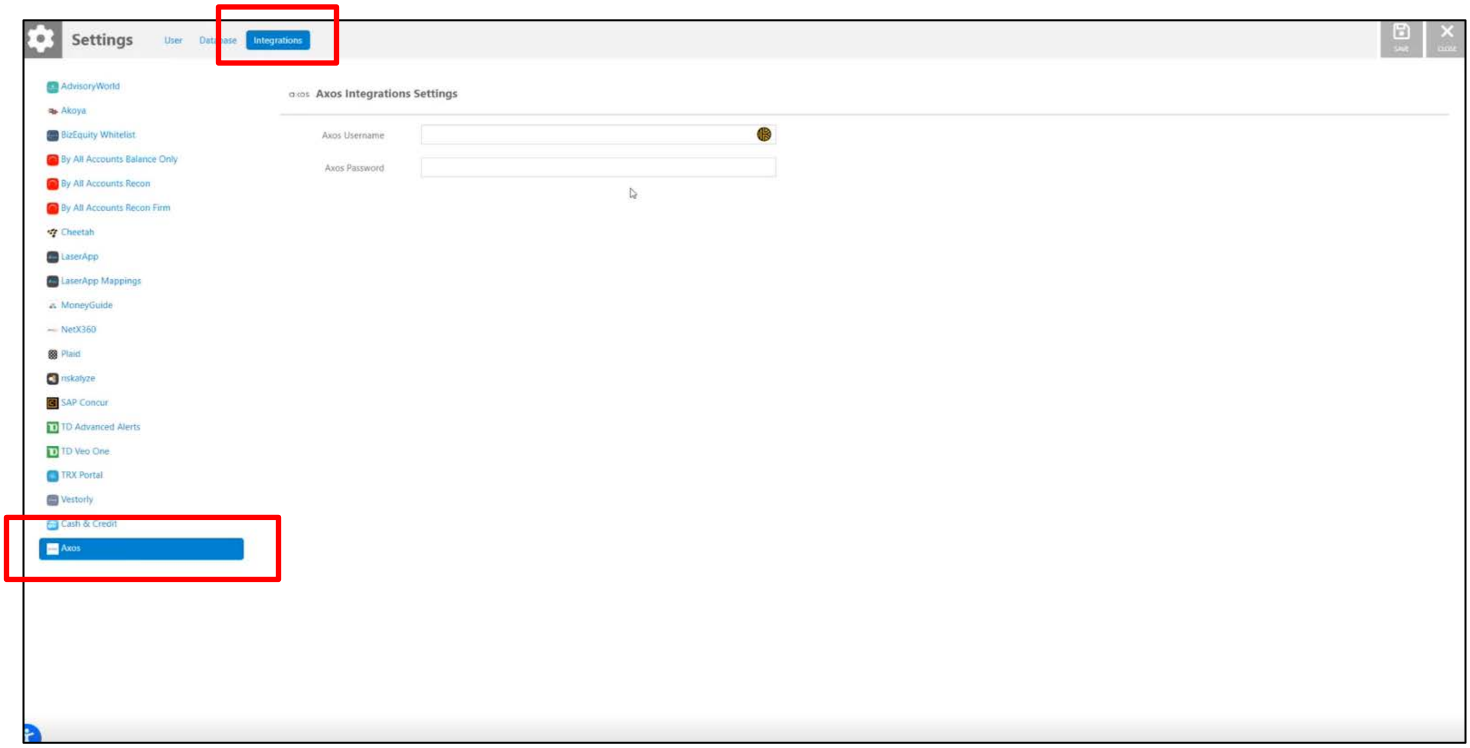
Orion Integration Setup

In the Orion System, go to Settings.

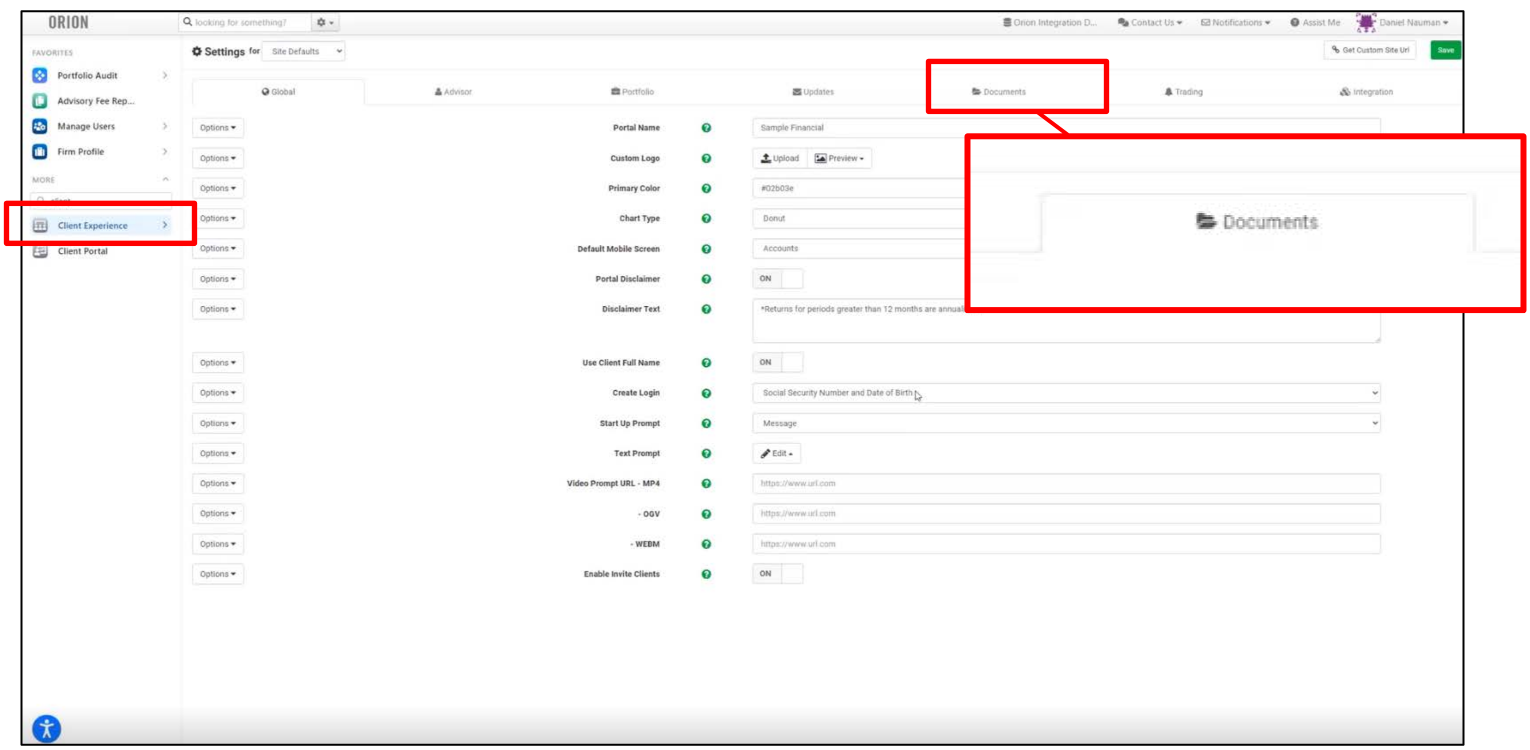


Select the Integrations tab and locate Axos.

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

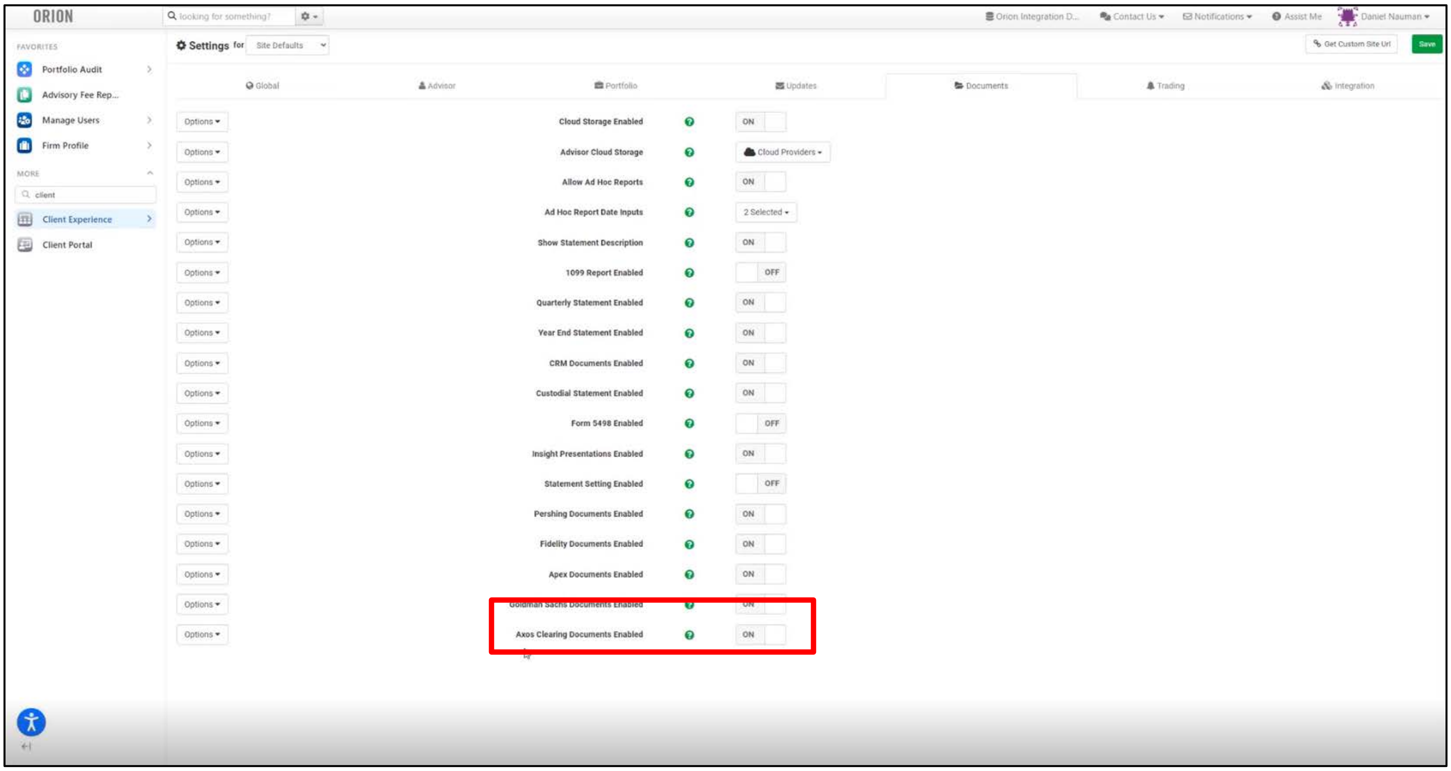


To turn on documents, navigate to the Client Experience Settings section and then, the Document tab at the top.



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

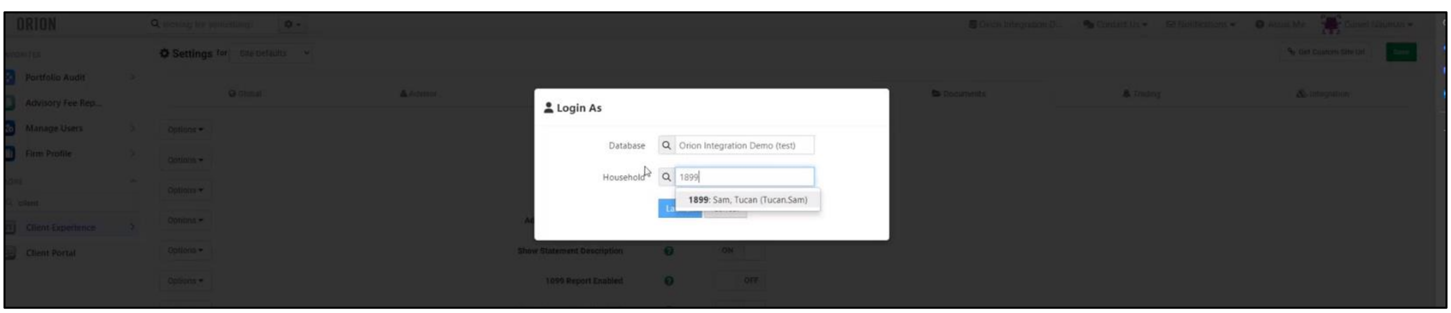
Once enabled, the setup is complete.



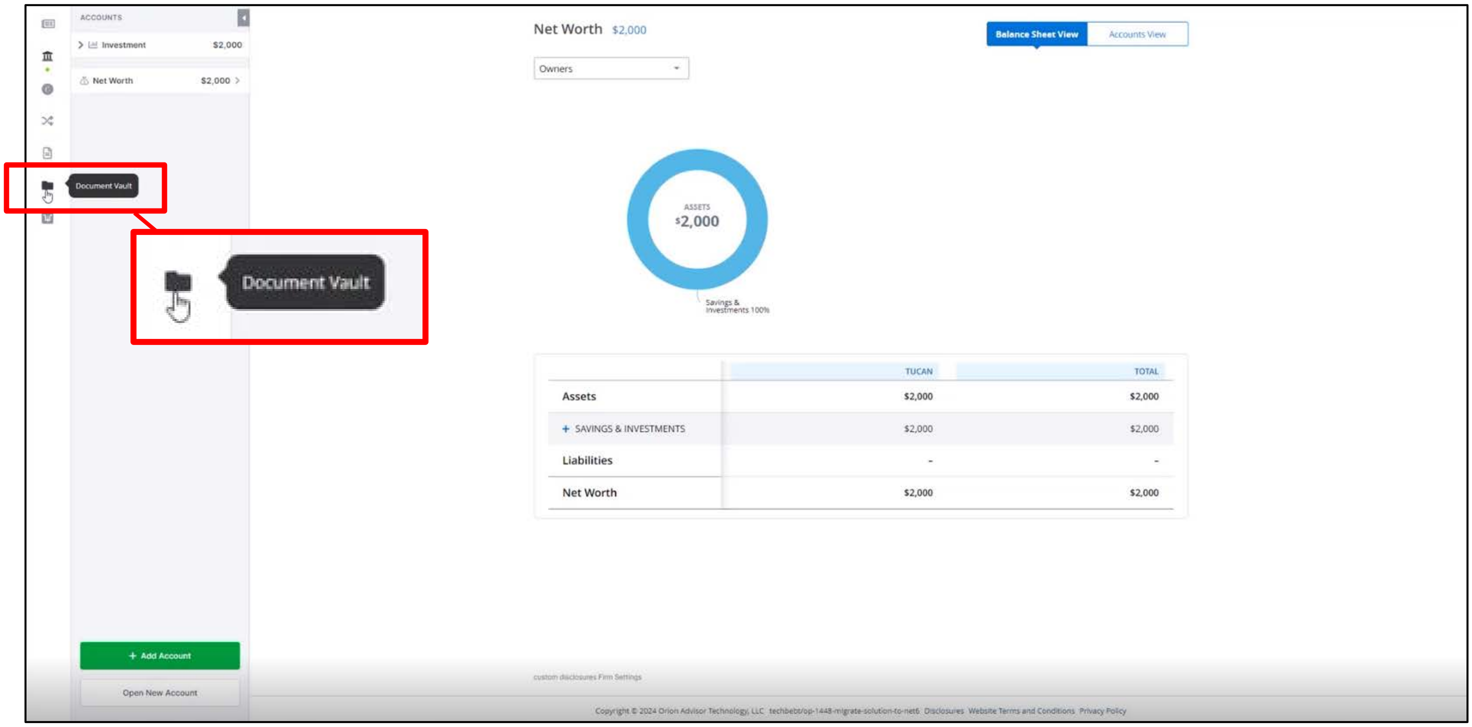
Accessing Client Statements and Tax Documents

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

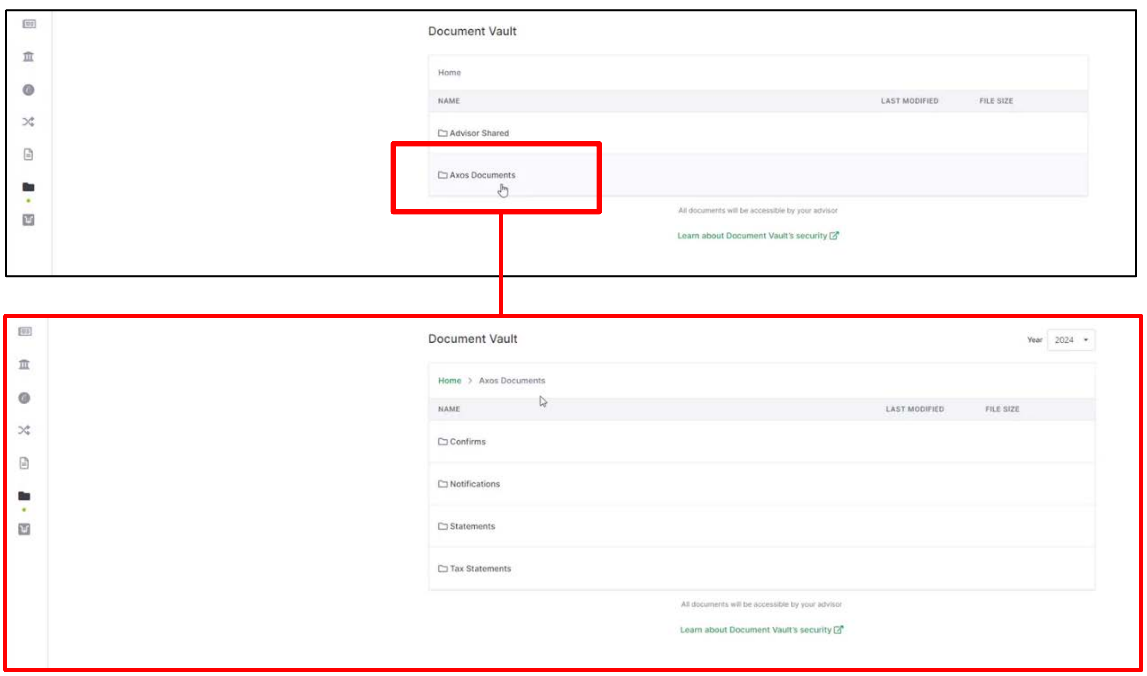
Enter the client Household (account number) to access the client’s documents.



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

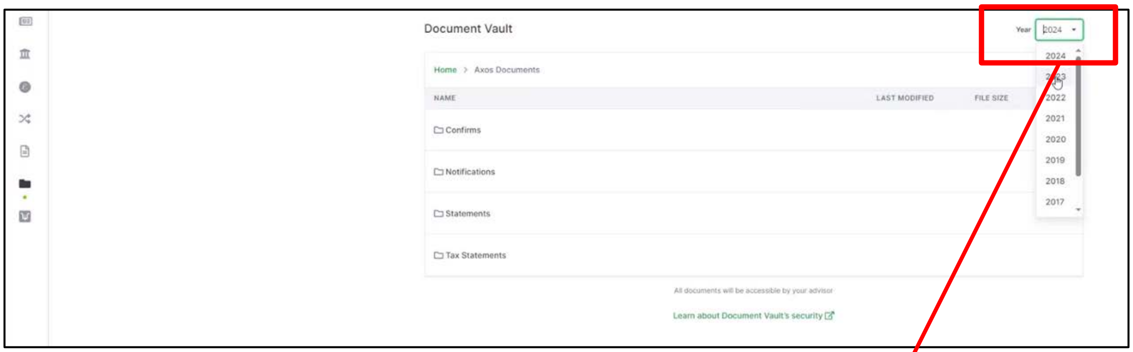


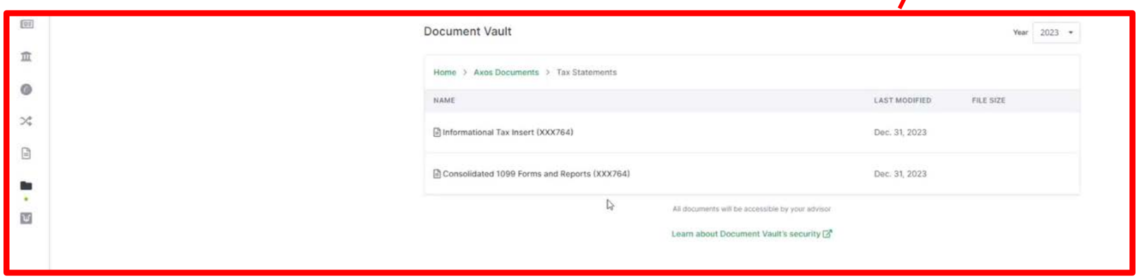
Select Axos Documents to display the Documents folder.



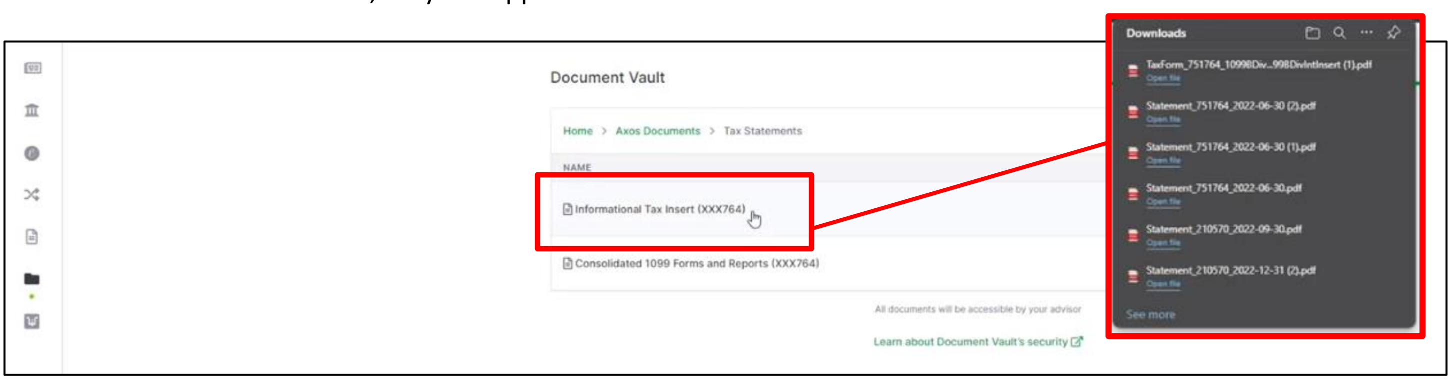
Documents are sorted by year.

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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