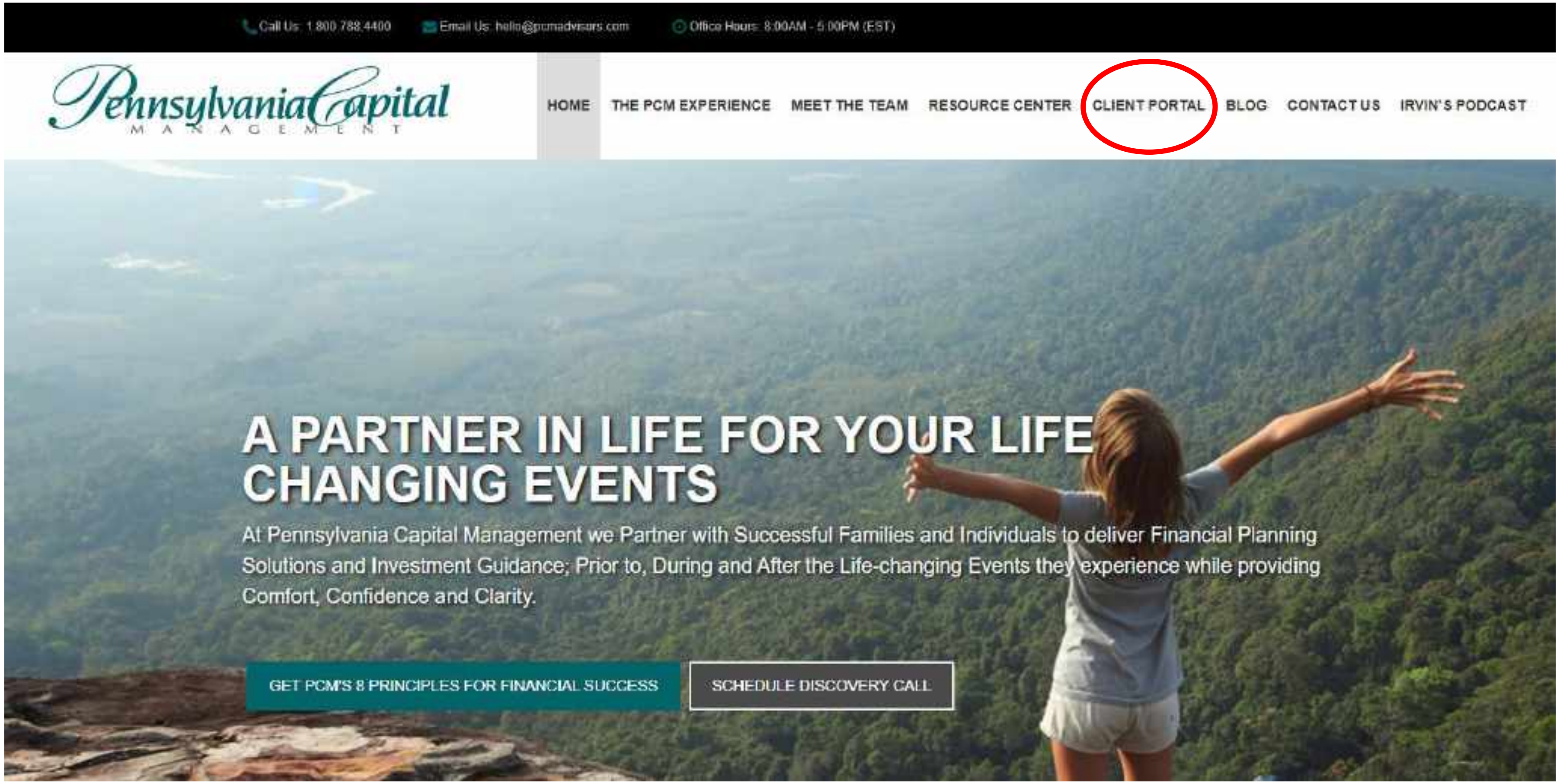
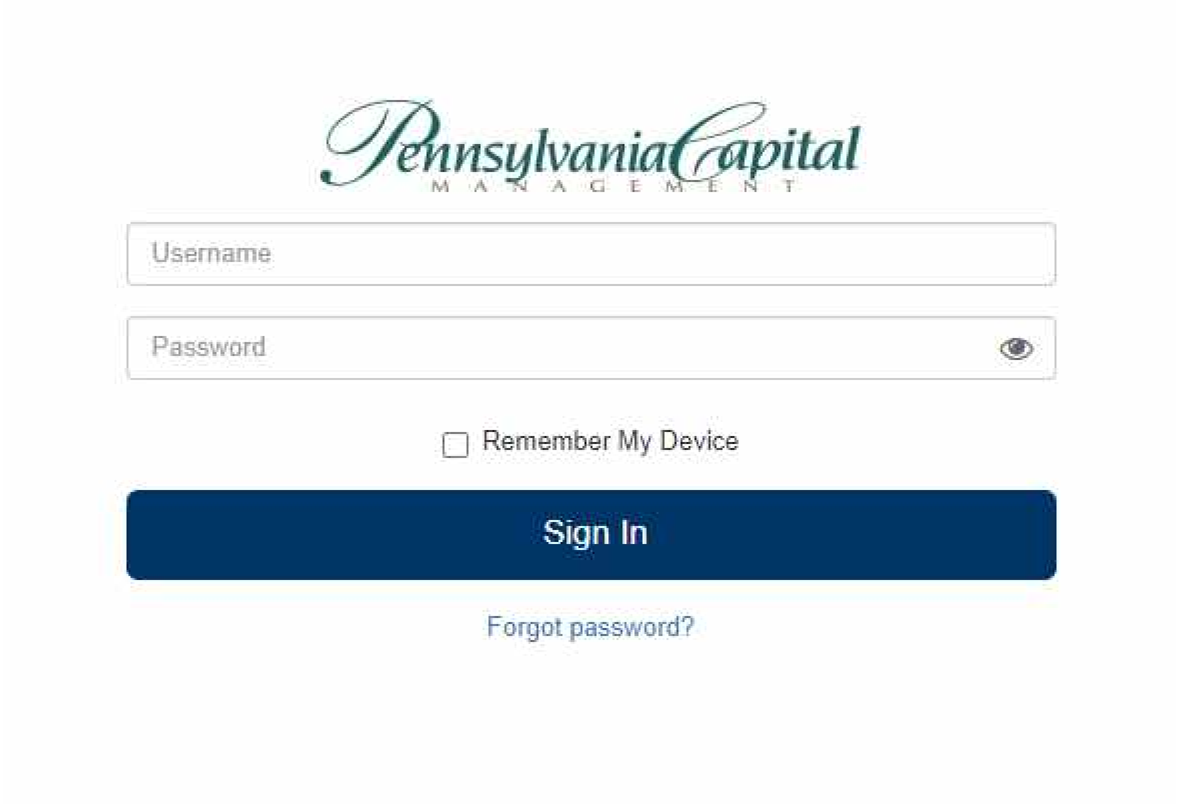
Pennsylvania Capital Management

Client Portal Instructions

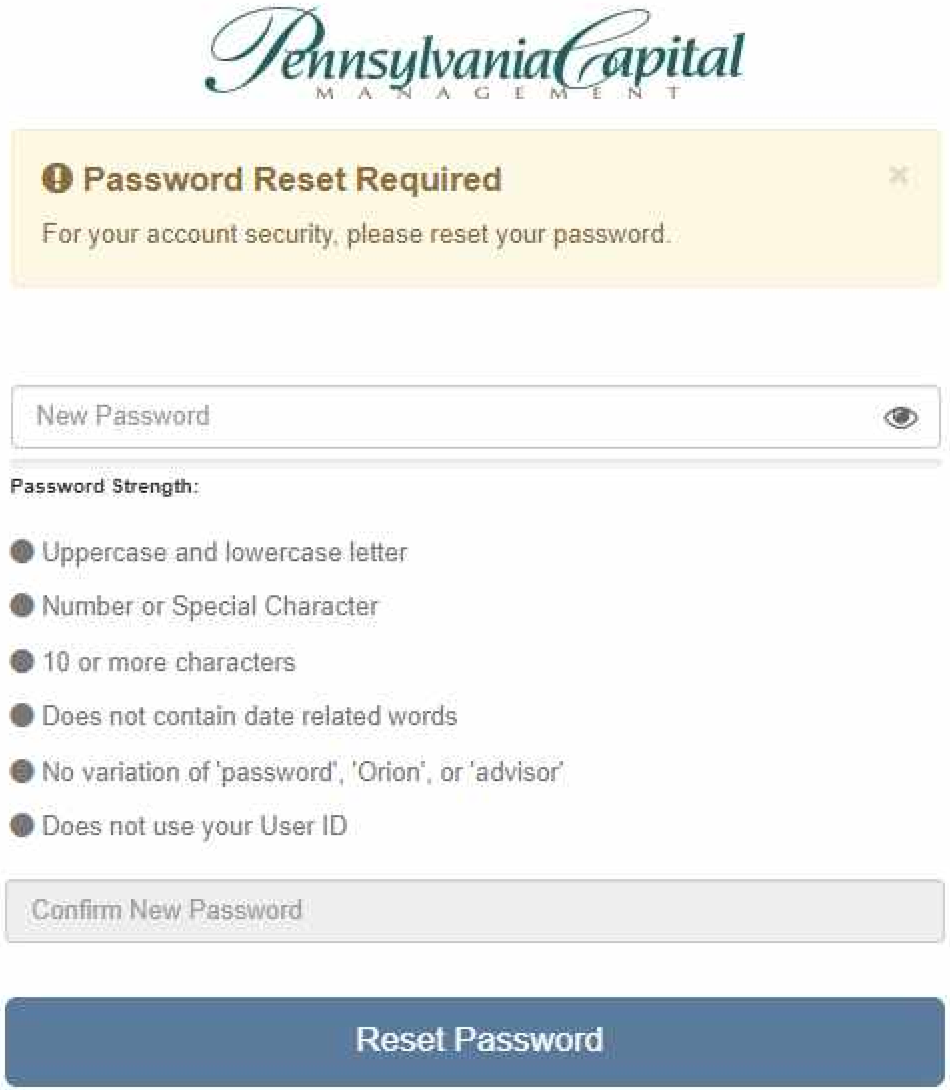
In a web browser, go to www.pcmadvisors.com. In the upper right corner, click on "Client Portal."



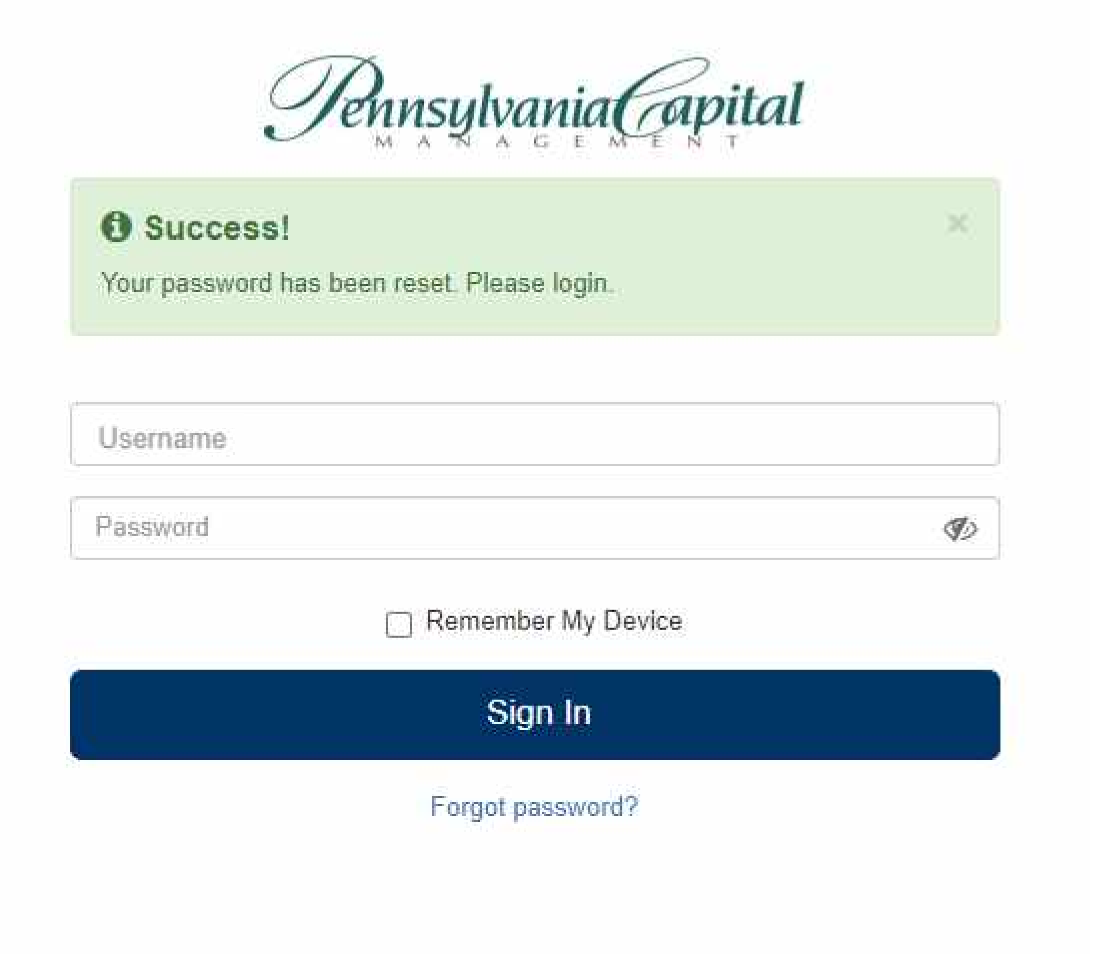
Enter your username (your primary email address) and password.



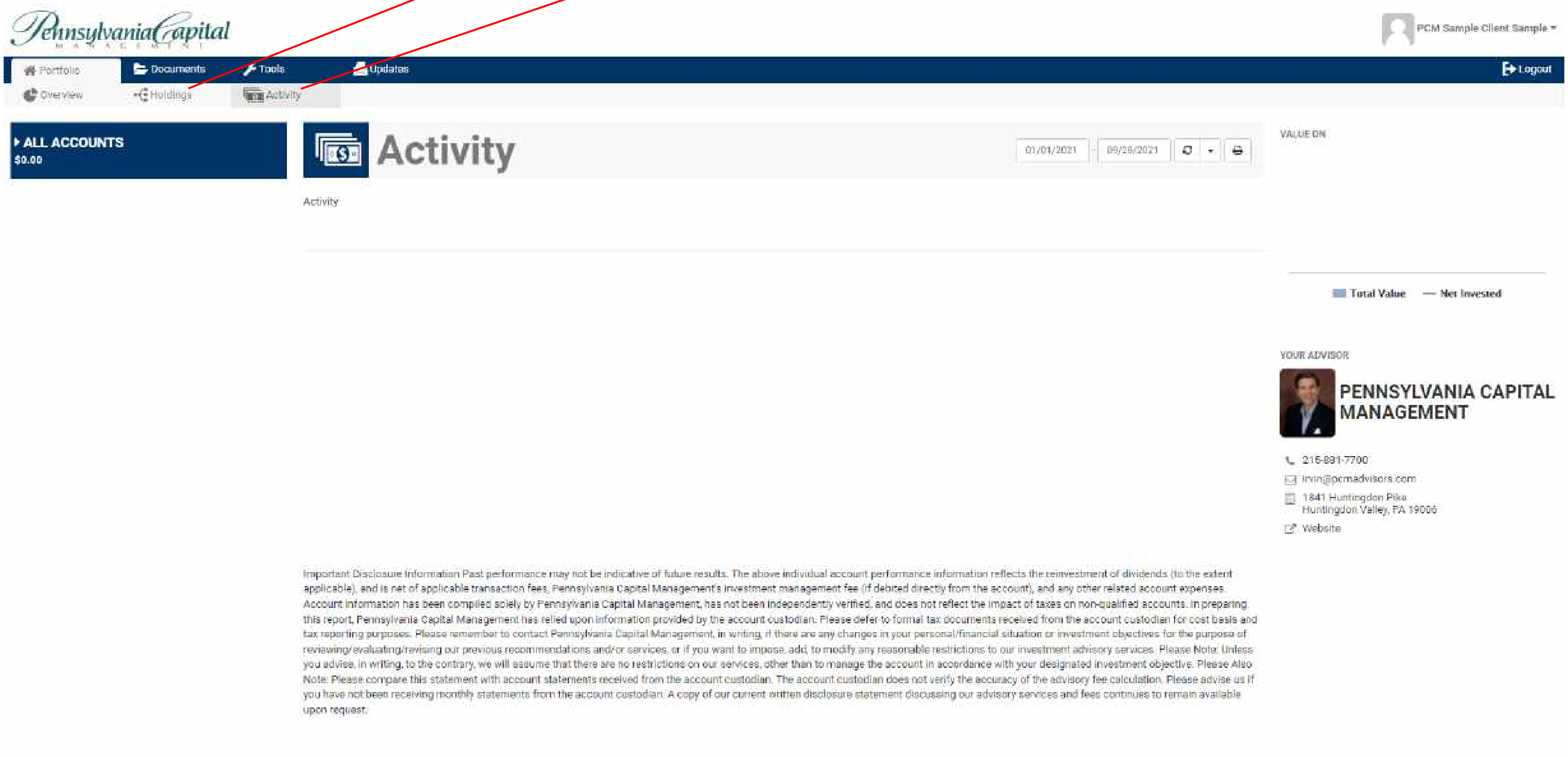
If this is the first time you are logging in, and you are using a temporary password provided to you in an email from Orion, you will be asked to create a new password.



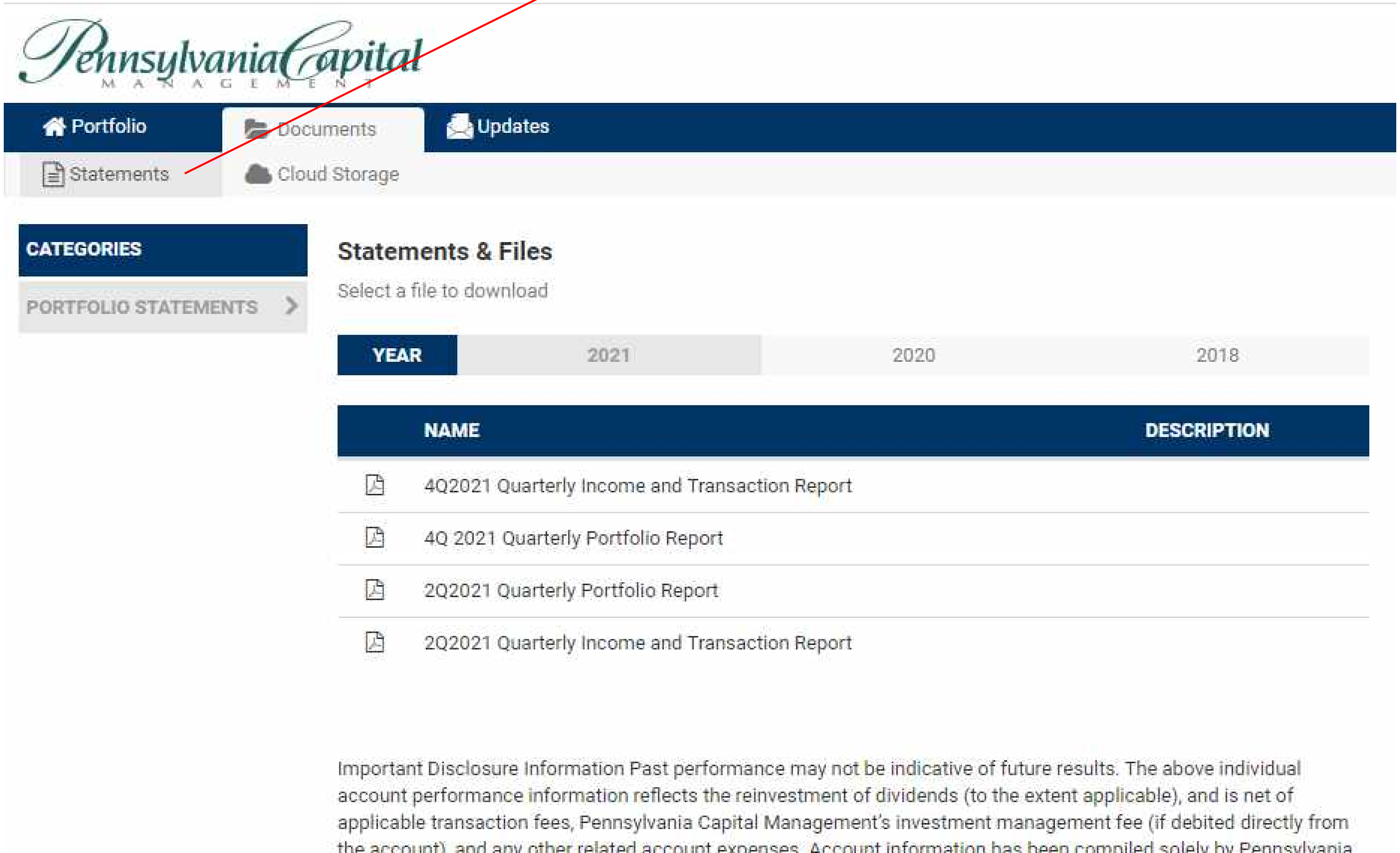
Once your password is reset, you can log in.



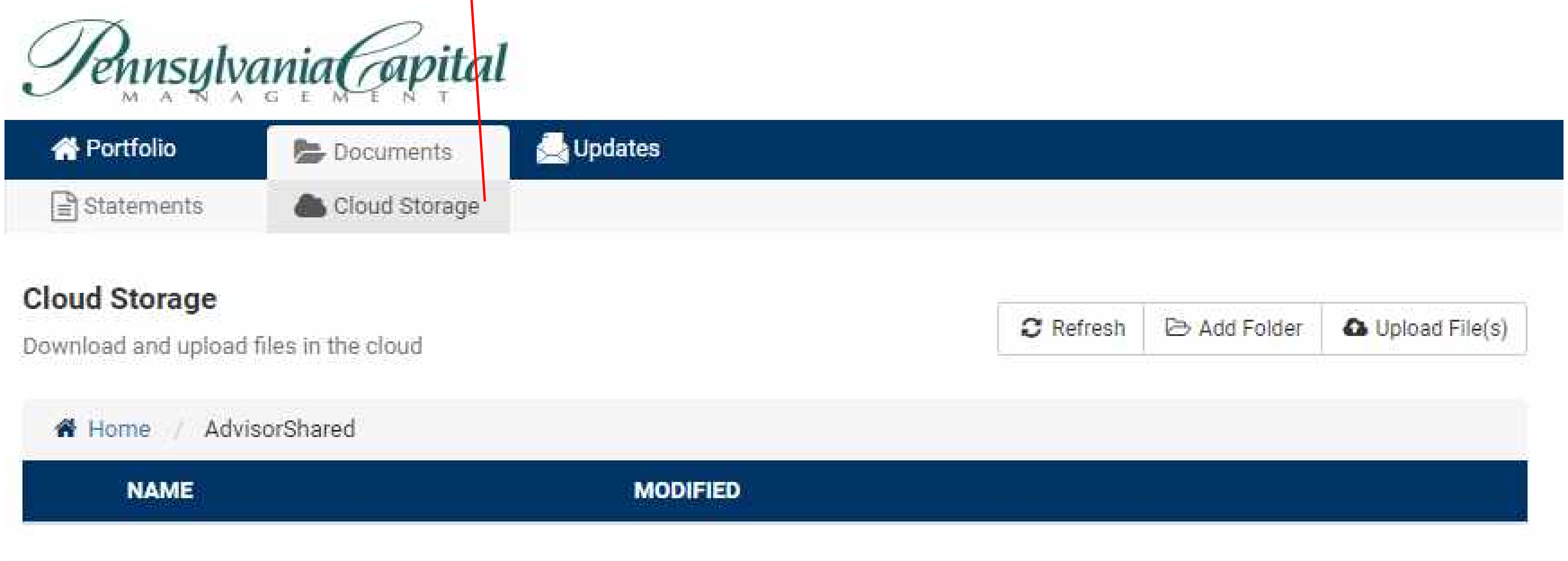
Once you are logged in, you have access to your accounts and activity in the Portfolio tab.



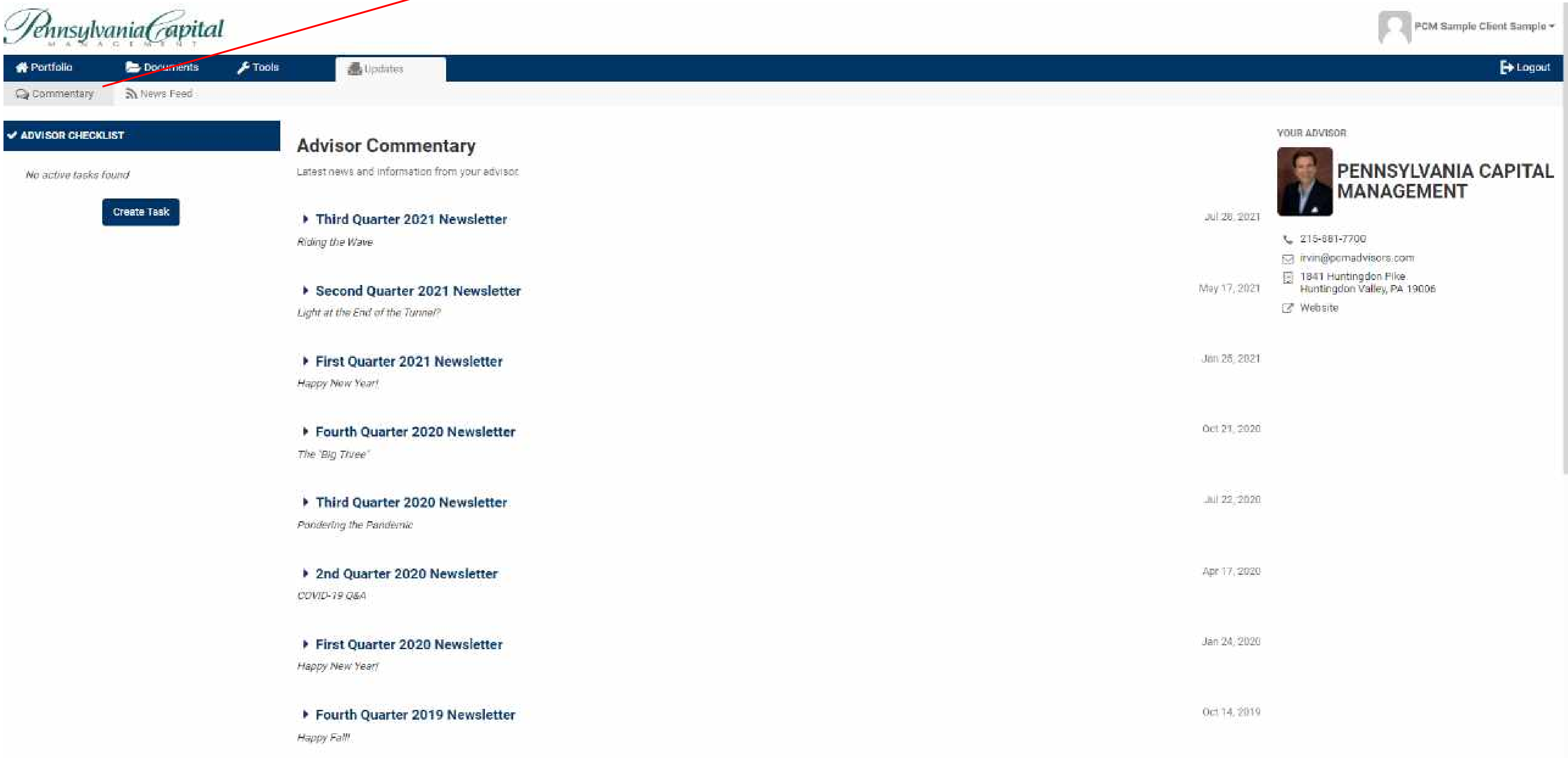
In the Documents tab, you have access to your quarterly statements and advisory fee notices.



In the Documents tab, you also can securely upload documents to our cloud storage.



Under the “Updates” tab, you will find Irvin’s quarterly newsletters.



Your login credentials and password will expire if you do not log in for six months.

If that occurs, please call your Client Service Team

at 215-881-7700 and we will be happy to assist you!

Pennsylvania Capital

MANAGEMENT