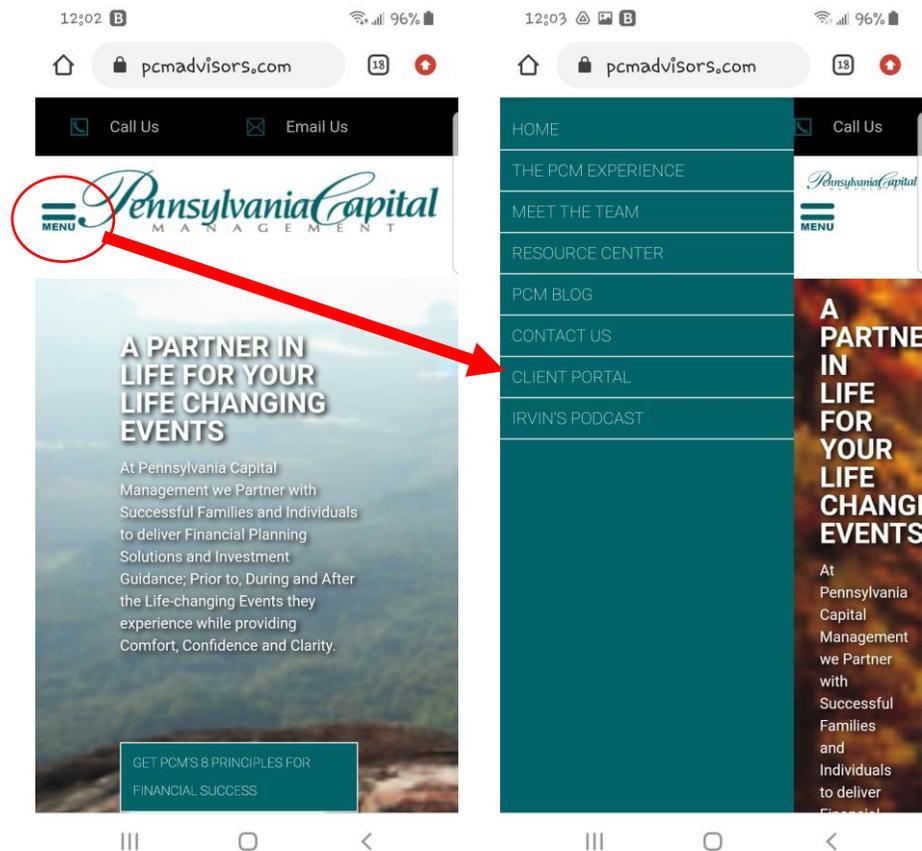
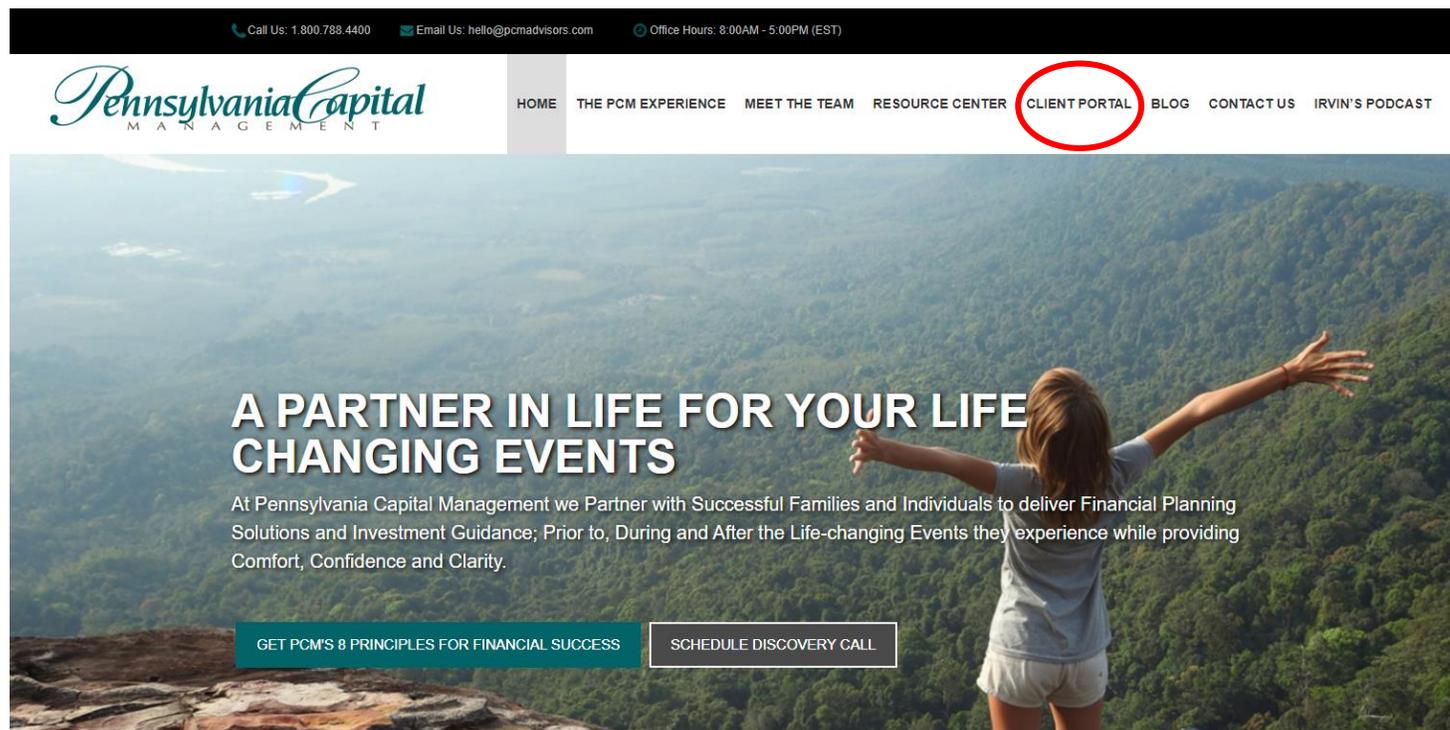




Client Portal Instructions

In a web browser, go to <https://pcmadvisors.com>. On a pc, in the upper right corner, click on “CLIENT PORTAL.” On a mobile device, click on “MENU”, and select “CLIENT PORTAL.”



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



MANAGEMENT

Username

Password 

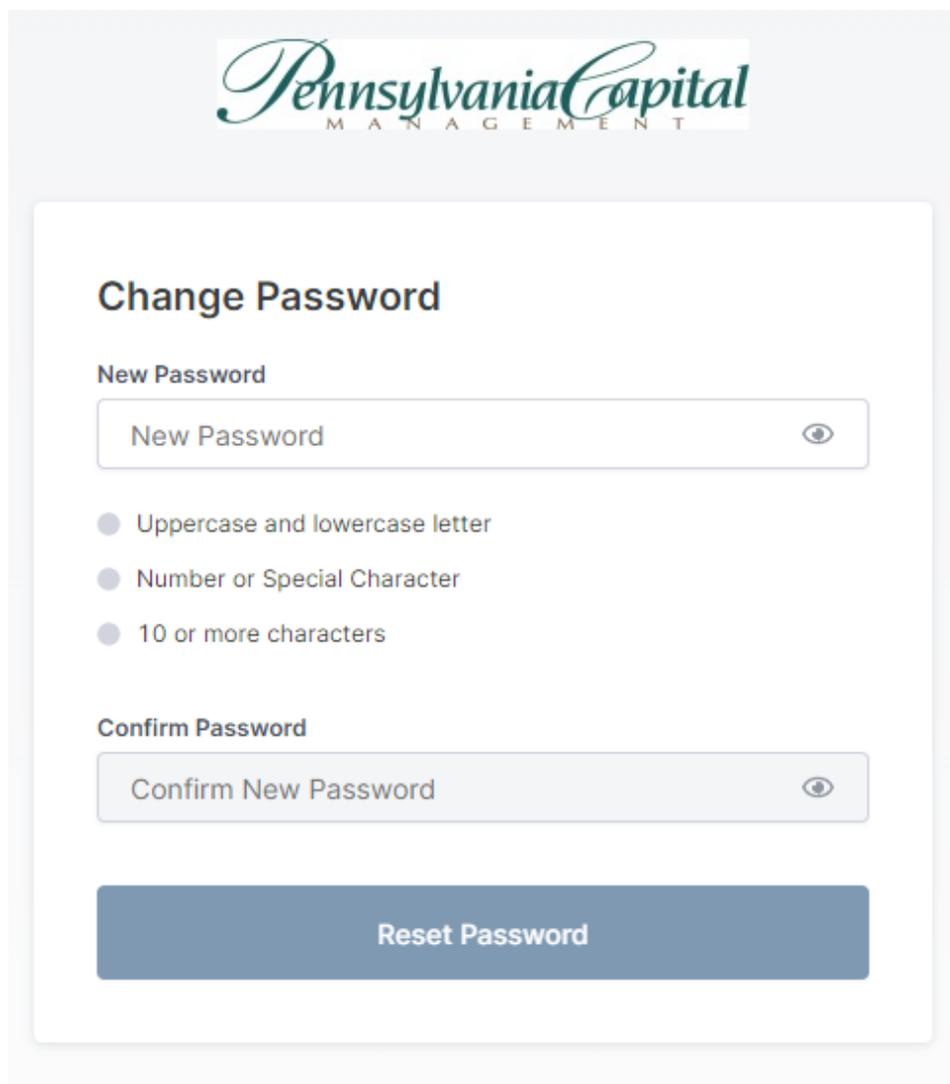
Remember My Device

Sign In

[Forgot password?](#)

If you have forgotten your password, click on “Forgot password?” and follow instructions on the next screen to have a Reset Password email sent to the email address associated with your login.

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.



The image shows a web form for changing a password. At the top, the logo for Pennsylvania Capital Management is displayed in a stylized green font. Below the logo, the title "Change Password" is centered. The form contains two input fields: "New Password" and "Confirm Password", both with eye icons for toggling visibility. Between these fields are three radio button options for password requirements: "Uppercase and lowercase letter", "Number or Special Character", and "10 or more characters". At the bottom of the form is a blue button labeled "Reset Password".

Pennsylvania Capital
MANAGEMENT

Change Password

New Password

Uppercase and lowercase letter
 Number or Special Character
 10 or more characters

Confirm Password

Reset Password

Once your password is reset, you can log in.



Success!



Your password has been reset. Please login.

newuser

Password

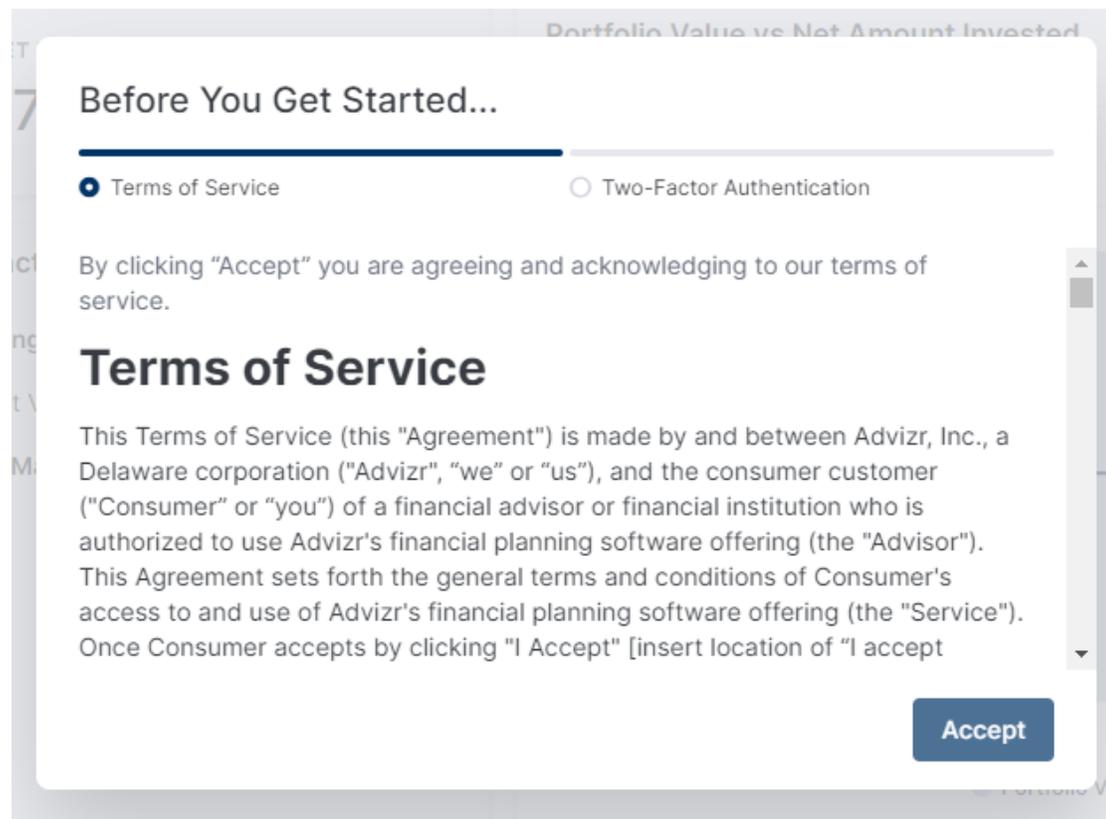


Remember My Device

Sign In

[Forgot password?](#)

The first time you log into the Client Portal, you will be asked to agree to Orion's Terms and Conditions. Scroll to the end and click "Accept."



Portfolio Value vs Net Amount Invested

Before You Get Started...

Terms of Service Two-Factor Authentication

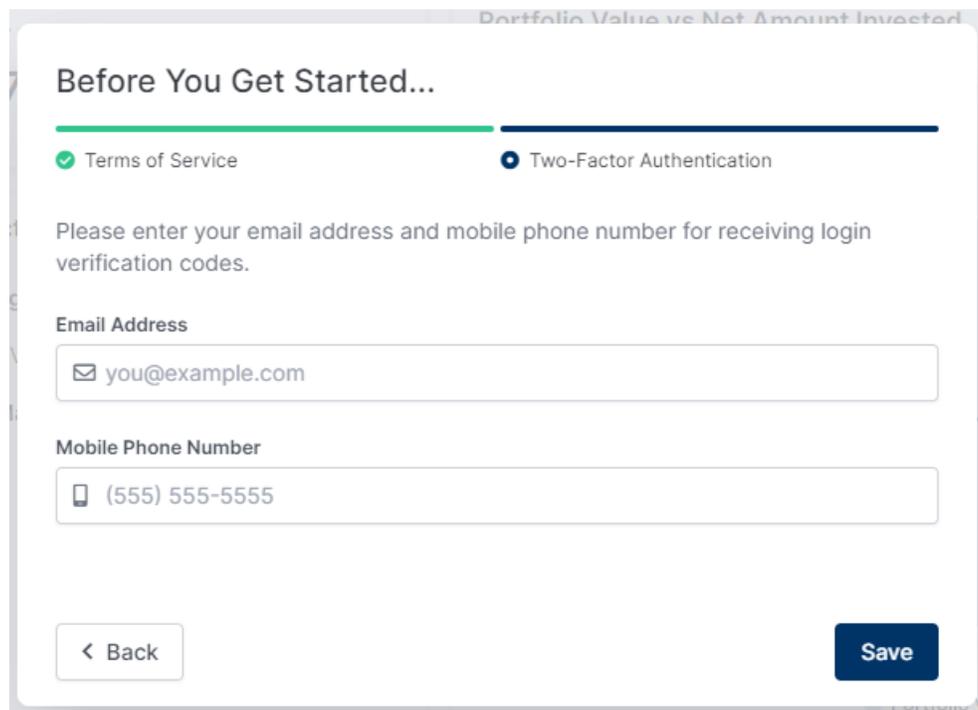
By clicking "Accept" you are agreeing and acknowledging to our terms of service.

Terms of Service

This Terms of Service (this "Agreement") is made by and between Advizr, Inc., a Delaware corporation ("Advizr", "we" or "us"), and the consumer customer ("Consumer" or "you") of a financial advisor or financial institution who is authorized to use Advizr's financial planning software offering (the "Advisor"). This Agreement sets forth the general terms and conditions of Consumer's access to and use of Advizr's financial planning software offering (the "Service"). Once Consumer accepts by clicking "I Accept" [insert location of "I accept

Accept

Two-Factor Authentication is now mandatory when logging into the Client Portal, and you will be prompted to set this up the first time you log in. For future logins, you will receive a code on your mobile phone in order to access the portal. Ensure the email address is correct and enter your mobile phone number and click on “Save.” This will prompt you to log in again, requiring the code sent to your mobile device.



Portfolio Value vs Net Amount Invested

Before You Get Started...

Terms of Service Two-Factor Authentication

Please enter your email address and mobile phone number for receiving login verification codes.

Email Address

Mobile Phone Number

Our new, modern interface opens with the **Personal Finance** app, where you can see an overview of your accounts, and drill down to individual holdings and custom time periods.

Pennsylvania Capital
MANAGEMENT

Click on an account type to see a list of your associated accounts. Clicking on an account will open that account's transaction history.

By default, the metrics are based on all of your managed accounts. Click on the dropdown to view information for a specific account.

Click on the tabs to view more details on the holdings in your account(s).

Update the timeframe to view the metrics as of a specific date range.

Link an account from an outside institution, or add an account manually to the portal.

ACCOUNTS

Cash \$41,714

Investment \$6,025,660

YOUR NET WORTH

\$6,067,374

Managed Accounts
Last updated: 12/31/2020 at 09:43

Summary Performance Positions Transactions

YTD 01/01/2021 - 02/12/2021

MARKET VALUE
\$1,564,523

PERFORMANCE
+5.21%

Transaction Summary

Beginning Value	\$9,148,684
Contributions	\$723,489
Distributions	\$284,367
Dividends & Interest	\$67,361
Transfers In/Out	\$20,764
Market Value Change	\$31,764

Portfolio Value vs Net Amount Invested

Line chart showing Portfolio Value and Net Amount Invested from Jan 4 to Feb 8. The Y-axis ranges from \$0 to \$12m.

Asset Category Allocation

ASSET CATEGORY	MARKET VALUE	ALLOCATION
Equity	\$1,200,931.40	52%
Bond	\$1,681,303.96	28%
Cash	\$1,200,931.40	20%

Asset Class Allocation

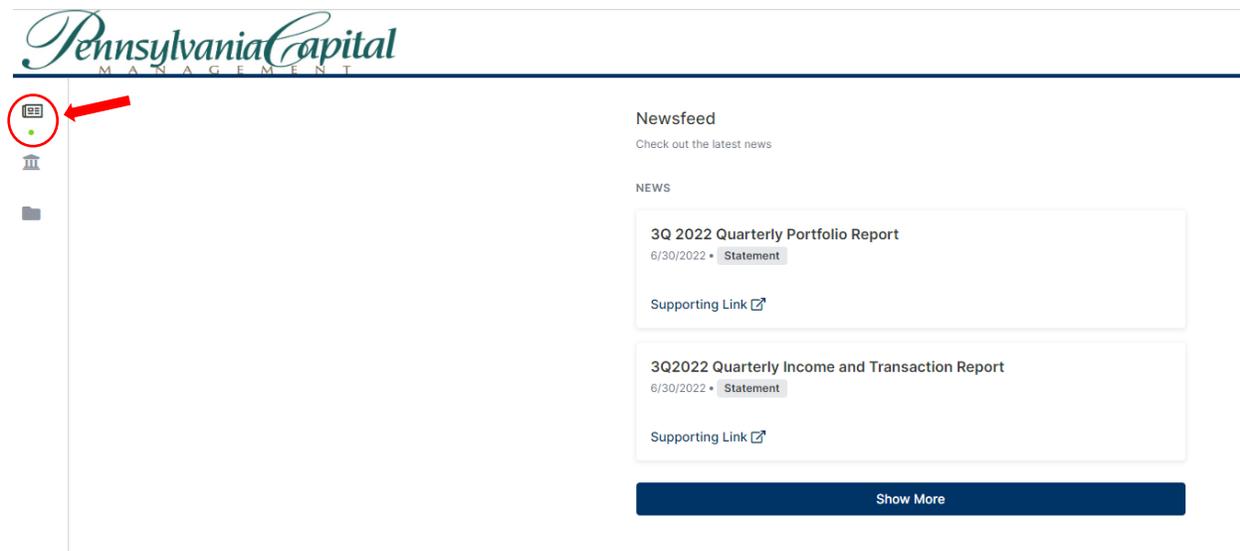
ASSET CATEGORY	MARKET VALUE	ALLOCATION
Large Cap Growth	\$2,882,235.36	28%
Large Cap Value	\$3,122,421.64	20%
Large Cap Blend	\$1,200,931.40	16%
Small Cap Blend	\$1,200,931.40	8%
World Large Stock	\$1,200,931.40	2%

Add Account

Link Management

Allocation Details >

The **Newsfeed** app features direct links to your quarterly portfolio reports and Irvin's quarterly newsletter.



The **Document Vault** app is where you will find Tax Reports, Portfolio Statements, Custodial Statements and an Advisor Shared folder where you can securely share documents with your PCM team

Document Vault

NAME	LAST MODIFIED	FILE SIZE
1099 Tax Reports		
Advisor Shared		
Custodial Statements		
Portfolio Statements		

All documents will be accessible by your advisor

[Learn about Document Vault's security](#)

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
M A N A G E M E N T