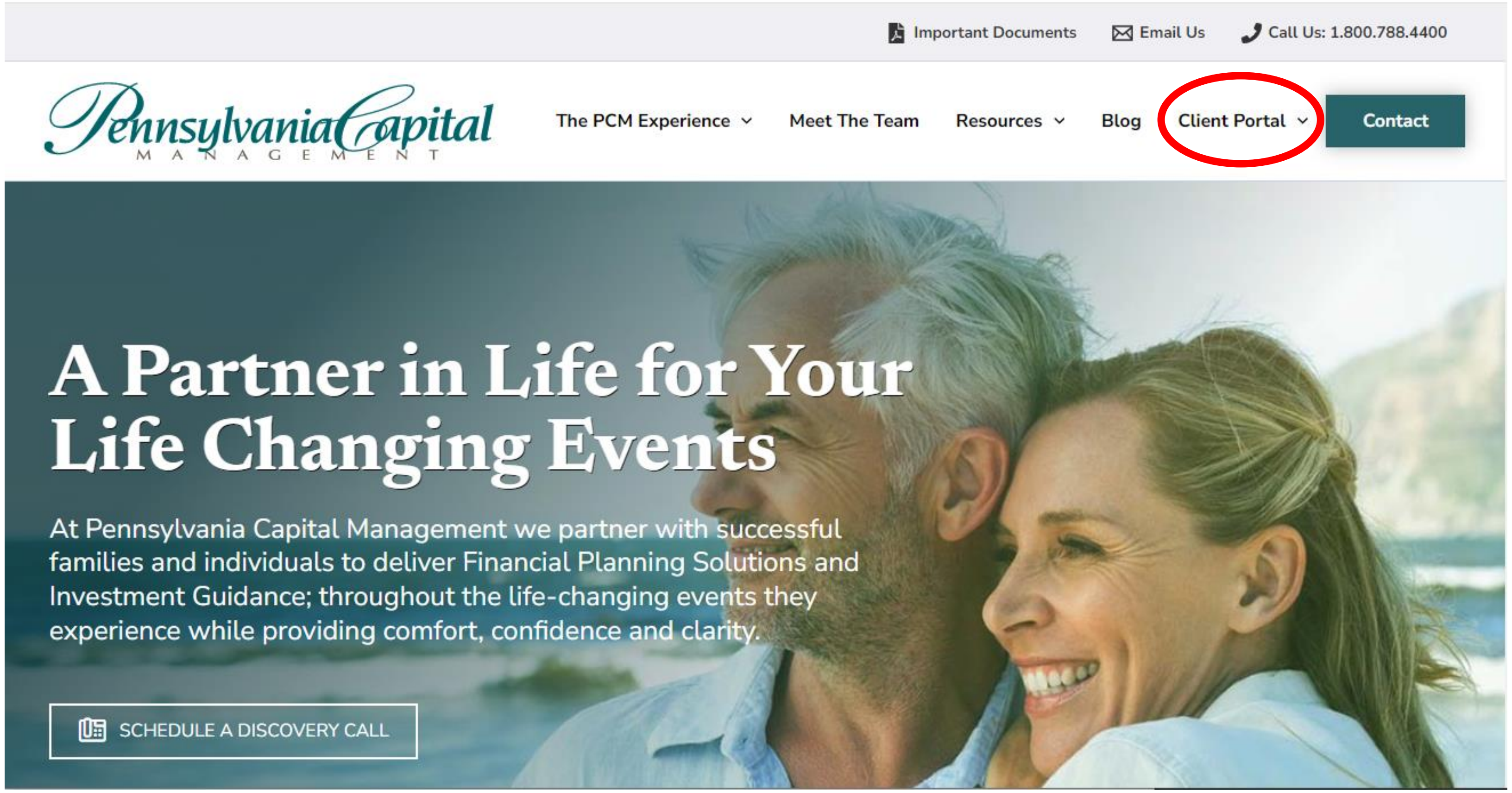
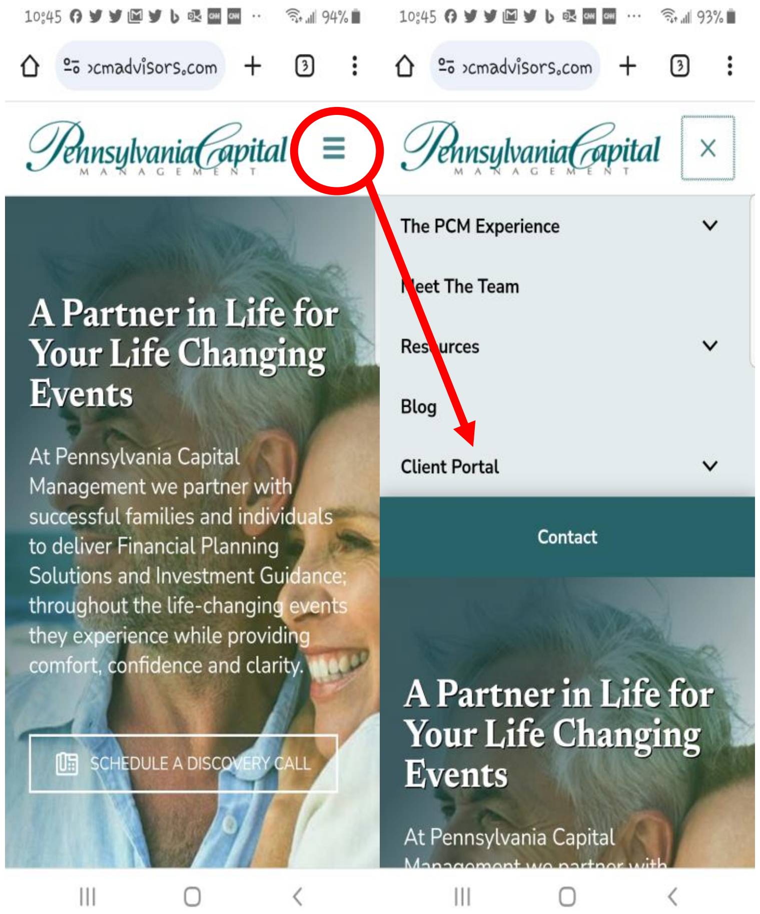
Pennsylvania Capital

MANAGEMENT

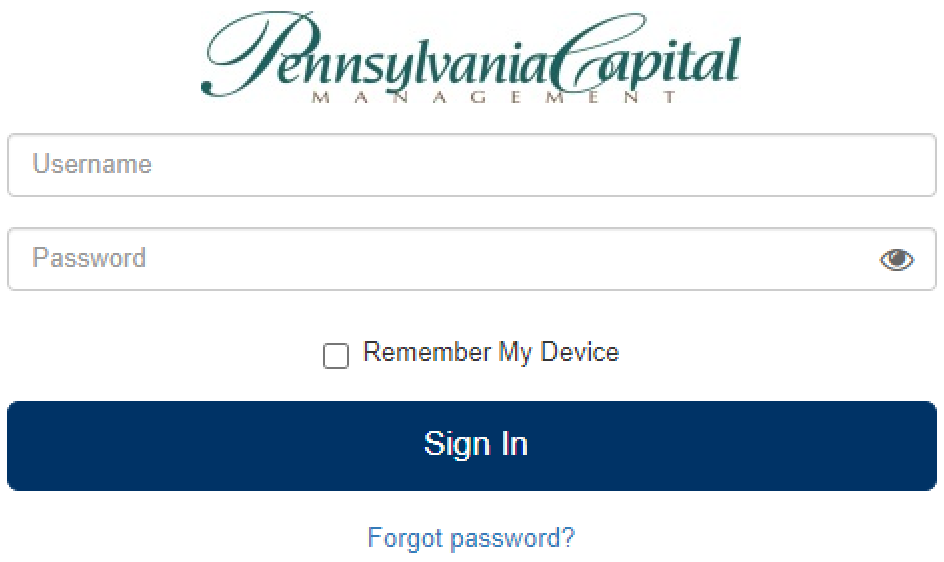
Client Portal Procedures

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.”



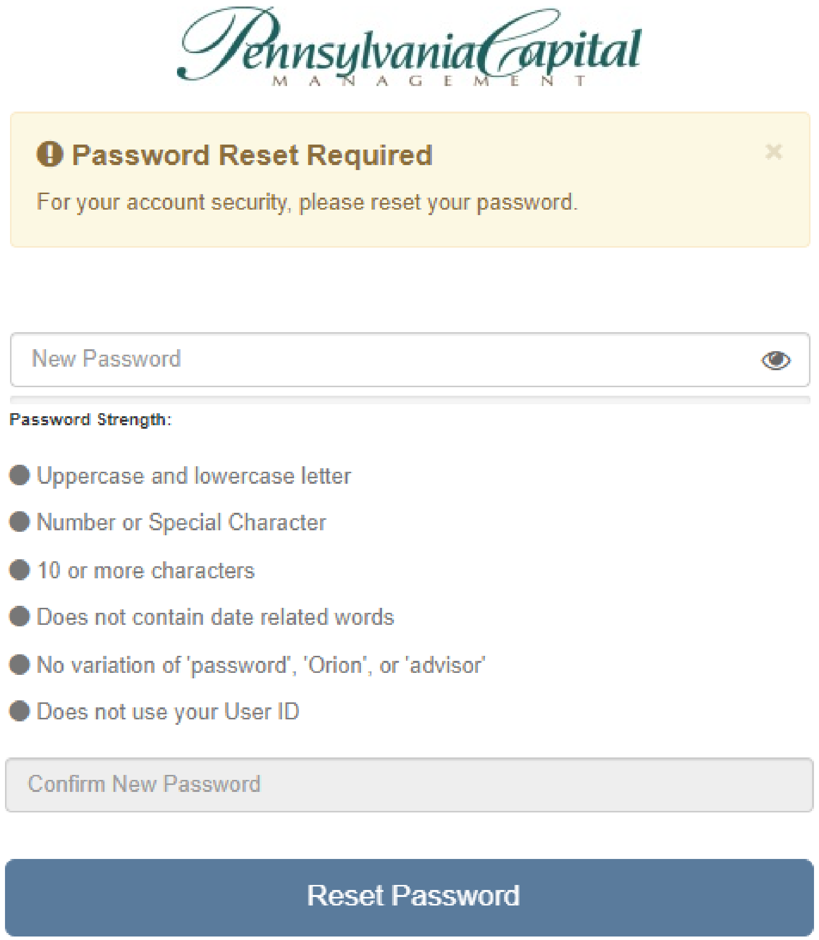


Enter your username (your primary email address) and password.

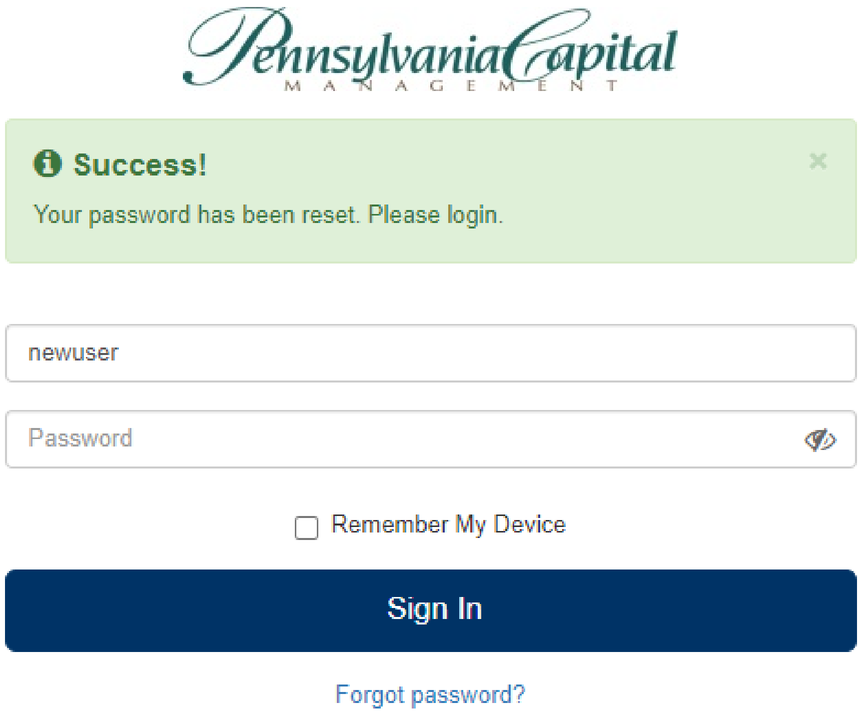


If you have forgotten your password, click on “Forgot password?” and follow instructions on the next screen to have a Reset Password email sent to the email address associated with your login.

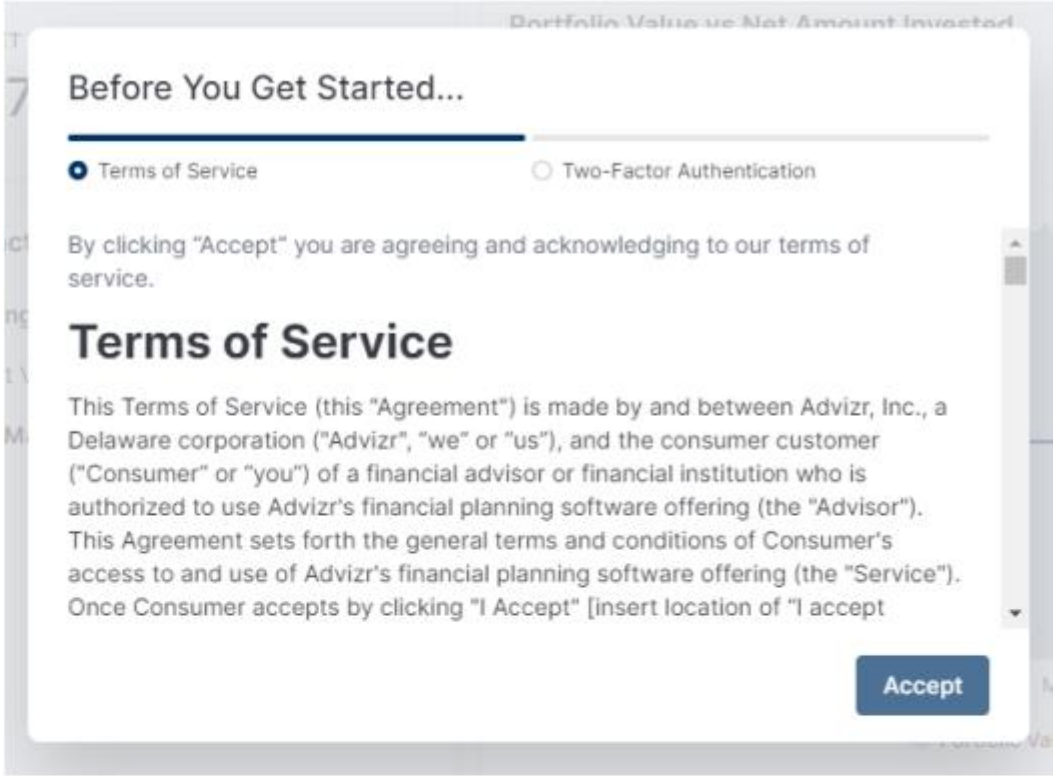
If this is the first time you are logging in, and you are using a temporary password provided to you in an email from Orion, you will be asked to create a new password.



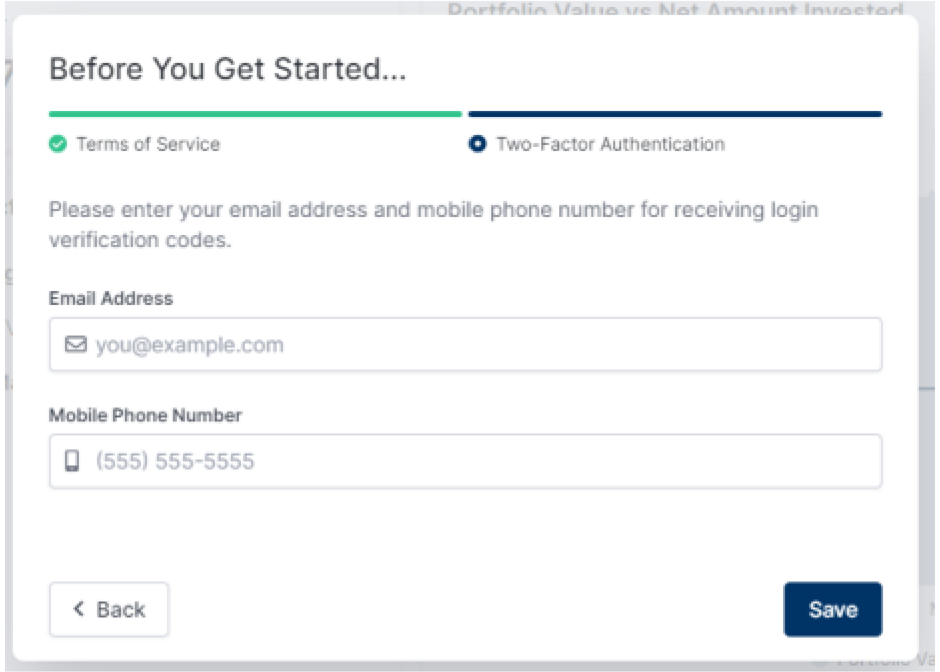
Once your password is reset, you can log in.



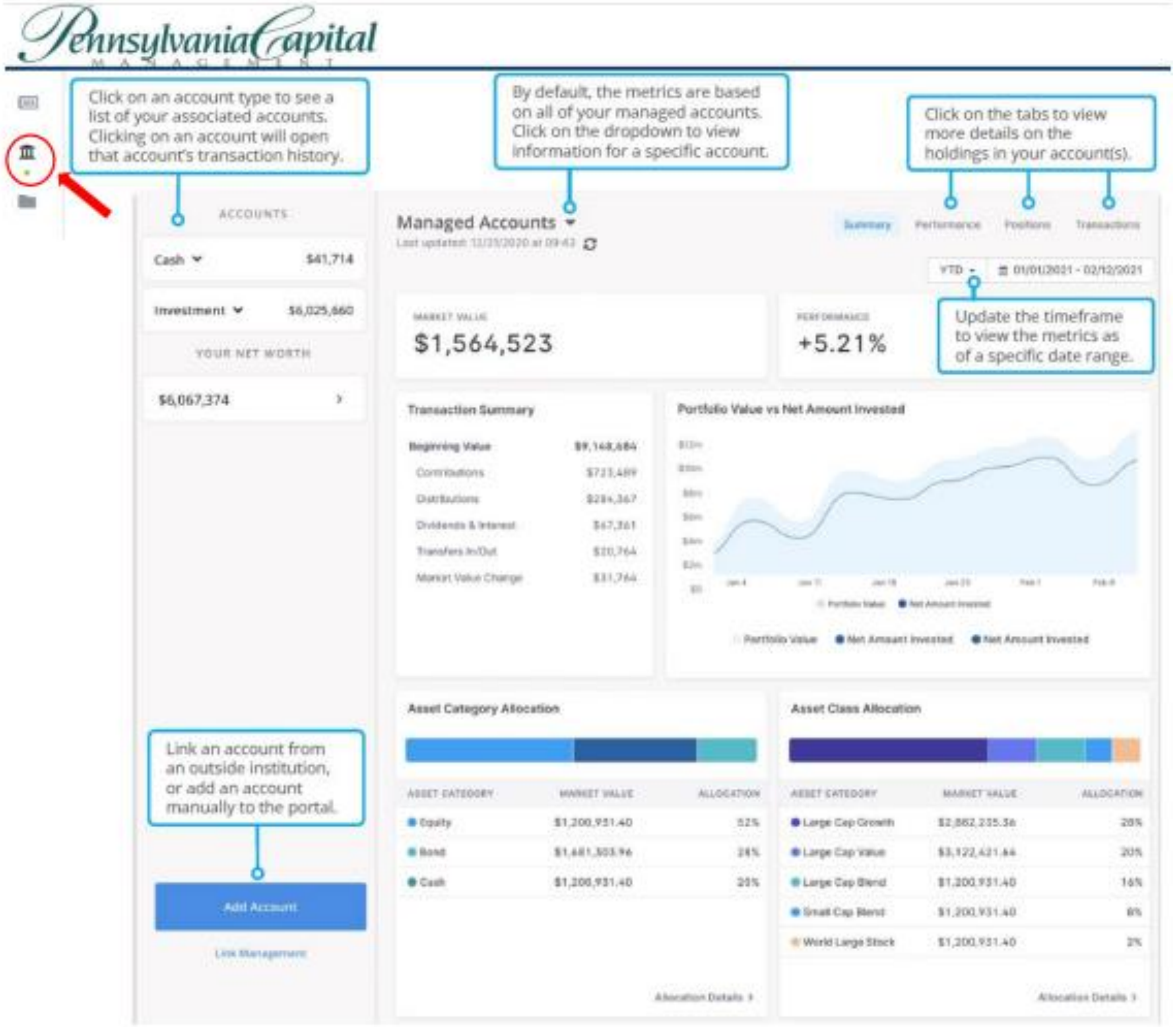
The first time you log into the Client Portal, you will be asked to agree to Orion's Terms and Conditions. Scroll to the end and click "Accept."



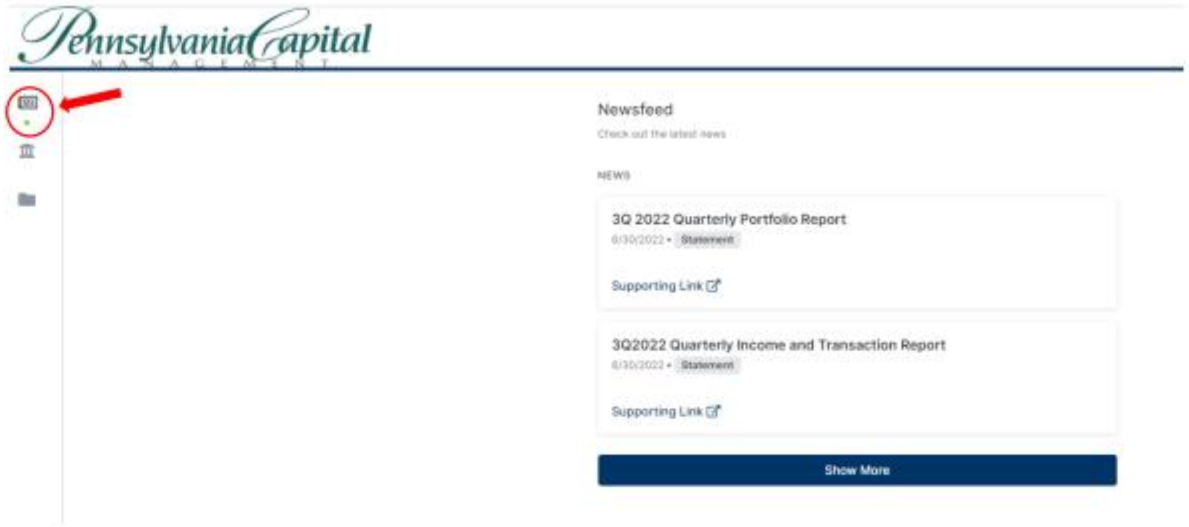
Two-Factor Authentication is now mandatory when logging into the Client Portal, and you will be prompted to set this up the first time you log in. For future logins, you will receive a code on your mobile phone in order to access the portal. Ensure the email address is correct and enter your mobile phone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



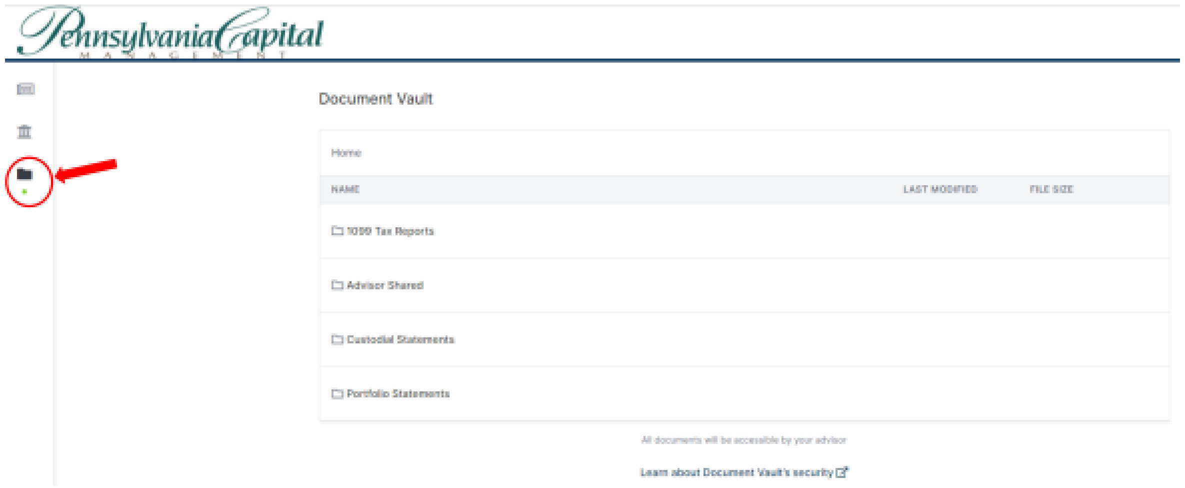
Our new, modern interface opens with the **Personal Finance** app, where you can see an overview of your accounts, and drill down to individual holdings and custom time periods.



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, Custodian Statements and an Advisor Shared folder where you can securely share documents with your PCM team.



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!

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