



Setting Up Your Foster Financial Client Portal

Hosted by ORION

Setting up your portal:

1. Watch for Your Invitation Email

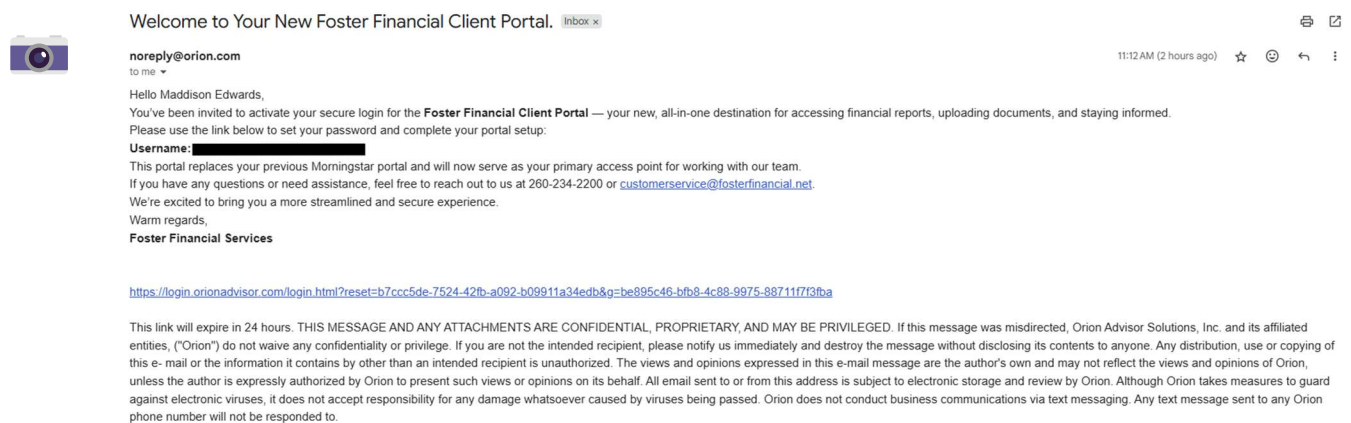
You'll receive an email invitation from **noreply@orion.com** with the subject line:

“Welcome to Your New Foster Financial Client Portal.”

✦ **Note:** The setup link in the email is valid for 24 hours. If it expires, contact us and we'll send a new one.

2. What the Email Will Look Like

Your email will look similar to this:



Click the secure link at the bottom to begin setup.

2720 Dupont Commerce Ct, Suite 170 Fort Wayne, IN 46825
260-234-2200 Office/260-234-2132 Fax
www.fosterfinancial.net

Securities & Advisory Services Offered Through Harbour Investments, Inc.

3. Create Your Password

After clicking the link, you'll be directed to a screen where you can set your password:



Change Password

New Password

Confirm Password

Reset Password

4. Set Up Two-Factor Authentication

For your security, you'll be prompted to choose an authentication method (such as a text message or authentication app):



Additional Security Required

For added security, please set up **one or more** of the following two-factor authentication methods. ?

Text Message (SMS)
Receive codes through text message (SMS)

Email
Receive verification codes through email

Authenticator (App)
Generate verification codes using an authenticator app

[Log in to another account](#)

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5. Log In and Accept Terms of Service

Once your password and authentication are set, log in to the portal.
During your first login, you will be asked to accept the Terms of Service.



Terms of Service

By clicking "Accept" below, such action constitutes your acceptance and acknowledgment of these Terms of Service.

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GOVERNING USE OF THE ORION WEBSITE

Last Updated May 9th, 2023

BINDING AGREEMENT

PLEASE READ THE FOLLOWING TERMS AND CONDITIONS CAREFULLY. By using the Orion website, software, platforms, products and/or services (collectively, for

Accept

✓ You're All Set!

You now have full access to your Foster Financial Client Portal.

Need Help?

☎ If you experience any trouble uploading documents or accessing the portal, please call our office at **260-234-2200** — we're happy to help.

-The Foster Financial Team

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