



Welcome to Advizr

Your Personal Financial App

All the tools you need to view and manage your financial life in a single, secure portal.

With Advizr – and your Johnson Bixby team to help you navigate – you can access and review financial accounts, assets, documents, investment performance, and more.

How To Get Started

1. To get started, click on the link received from your Johnson Bixby team member.
2. Your username is your email address.
3. Create a password.

Ongoing Access

Access the site any time by navigating to <http://app.advizr.com> and enter your username and password. We recommend bookmarking the site for you to quickly access in the future.

Organize Your Finances from Your Phone

Download the Orion Wealth Management Portal app on your phone or tablet and login using the same credentials when you first registered.

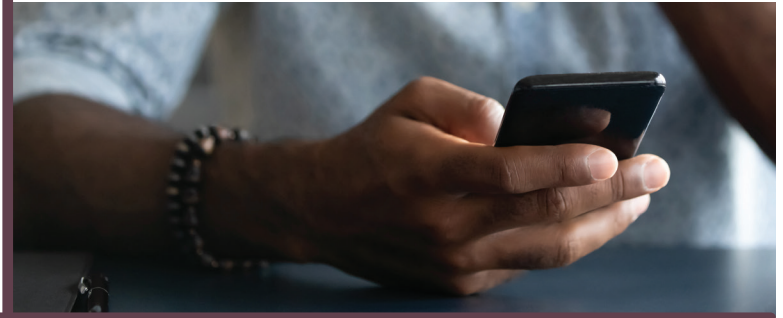


Personal Finance Page. If Johnson Bixby manages investments for you, this page offers a look at the details of those investments. Toggle between the Summary, Performance and Positions tabs to view details on your asset allocation and account performance. Choose between many time frames such as Year-to-Date (YTD), Since Inception or set your own Custom Range.

New to Johnson Bixby? If no assets are managed for you by Johnson Bixby, you will view a breakdown of your net worth based on the information you've entered or linked for your outside assets.



Your Document Vault is a secure place to upload documents to share with your Johnson Bixby team. To upload a file, drag and drop a file or browse your computer to select the document for upload. To access the Vault via a mobile device, you must use the app. The Vault will also be used by Johnson Bixby to share documents with you.



Client Overview Page provides a running tally of your Net Worth from the point at which your profile was created. Linking outside accounts through the account aggregation option will also allow you to view transactions for help with cash flow and budgeting.



Add Accounts

Link: Advizr provides account aggregation giving you a comprehensive current view of your financial life. Linking to a 401k, mortgage or other financial account provides up-to-date information for your Financial Planner to view allocation or balances owed. Simply search for the institution where your investment is held and enter your credentials to link your account.

Once an account has been added, use the "Account Preferences" menu to further customize preferences. Some 3rd parties require occasional re-linking, which also can be handled here.

Add Manually: Account, properties, vehicles or other investments can also be added manually. Select the type of asset you'd like to add and enter the information you have available. When added manually, values will not automatically update.



JOHNSON BIXBY

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*Advisory services offered through Johnson Bixby, an SEC Registered Investment Advisor.
Securities offered by Registered Representatives through Private Client Services. Member FINRA/SIPC.
Johnson Bixby and PCS are separate and unaffiliated.*