

Getting Started with ORION PLANNING

Orion is pleased to share access to our Financial Planning and Wellness Tool, provided through Orion Planning (formerly Advizr). Just like exercising and eating nutritious foods are good habits for your physical health, having a positive relationship with money is good for your peace of mind and well-being.

Access to our financial wellness tool allows you to:

 Assess retirement readiness	 Prepare an emergency fund	 Manage and view debts
 Track spending and budgeting	 Plan and save for education costs	

Once you [register](#) to access the platform*, you can select your short- and long-term financial priorities, aggregate your bank accounts if you desire, and track progress to meeting your goals.

*Please use a personal email address to register.

Ready to get started? [Register Here!](#)

After you've registered, you can access the following videos for a step-by-step demo of how to use the planning tool.

<p>1</p> <p>How to Get Started in Orion Financial Planning</p> <p> Video One</p>	<p>2</p> <p>How to Add More Details to Your Plan</p> <p> Video Two</p>	<p>3</p> <p>Additional Available Features within Orion Planning</p> <p> Video Three</p>
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QUESTIONS?

Contact Human Resources at hr@orion.com or call 402.896.7725