



Online Access / Cyr Financial App / Quicken Investment Tracking

1) Orion Online Access

If you have not already received access to online reporting, please call our office to request authorization. The first time you login, you'll be prompted to create a new password. Once you have authorization, you may access online reporting system in two ways...

Navigate to login.orionadvisor.com and login

- OR -

Navigate to www.cyrfinancial.com and click the client portal link ->

You may use this online access to view basic balance information. However, there are many other features you are free to explore. If you don't see what you want or are simply curious, call us up and schedule a visit for a reporting tutorial from one of our staff.

2) TD Ameritrade Online Access

To access your TD Ameritrade, you will first need to contact our office manager to set up a UserID. Once your UserID is set up, navigate to www.advisorclient.com and click "Get Started" followed by "Already have a UserID?" Here you will enter your UserID and the zip code of your physical address. Next, you will be asked to choose a method in which to receive a security code. Once entered, you will create a password and set up your new account.

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Cyr Financial Incorporated is a Registered Investment Advisor

3) The Cyr Financial iPhone / Android App

To access our Cyr Financial application via iPhone or Android, search for “Cyr Financial” in the App store and download the **Cyr Mobile** app. The username and password are the same as the PC/Tablet credentials.



4) Quicken Investment Tracking

- With your account number(s) in hand, call TD Ameritrade at (800) 431-3500 Option 4 for technology with your account number(s) available. Request that your accounts be activated for Quicken Reporting
- Then open Quicken and select File and then New Quicken File in the upper left corner
- Select New Quicken Account and click OK
- Click on Brokerage under Investing & Retirement
- Choose TD Ameritrade for your financial institution
- Enter your 9-digit Account Number in the UserID/username box, your 4-digit Pin (last 4 digits of the social security number) number in the Password fields and click Connect
- Click Next in the lower right
- Possibly give the account a Nickname and select Next
- Quicken should then identify the account and then you will select Finish
- You will then have to select the red flagged account on the left side of Quicken on the account list to open a window and accept all the transactions
- After all transactions have been accepted, you will be prompted to enter your current cash balance, and select Done

If you experience any issues linking your account, call TD Ameritrade at (800) 431-3500 Option 4 for technology.

If you have any questions, please contact our helpful staff.