

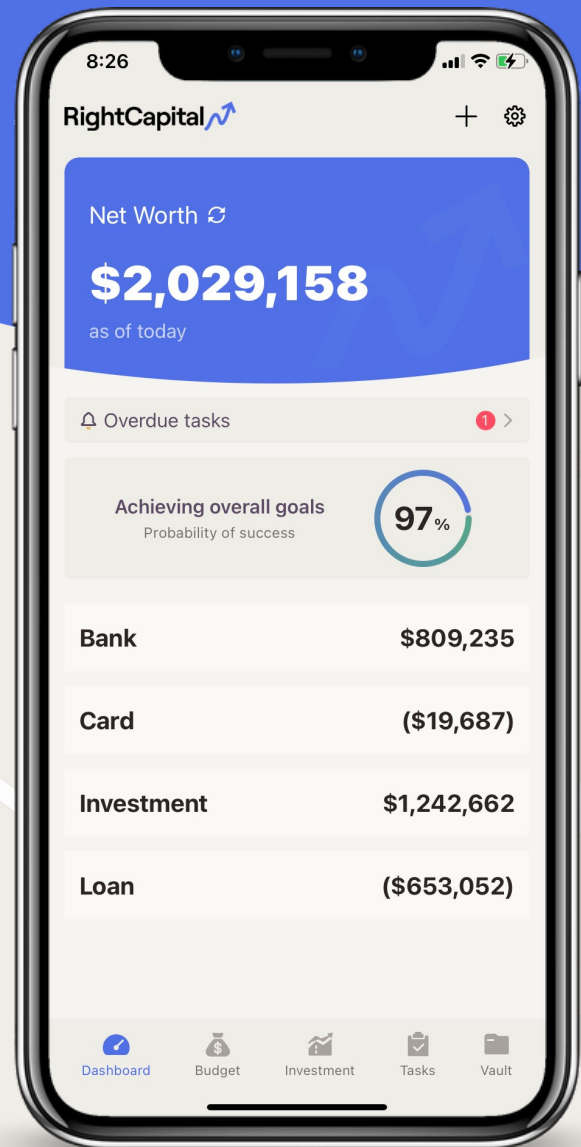
# See your finances on the go!

## Mobile App

For Android and iOS

- Link accounts and view balances
- View your probability of success
- Track expenses against your monthly budget goals
- Create budget categories
- Review and re-categorize transactions
- View asset allocation for all holdings or by account
- Create and complete tasks
- Receive notifications regarding upcoming tasks
- Upload files securely in the Vault

Before downloading the app, make sure that you've been added and invited to the client portal and that you've set up your RightCapital account.



Available on Apple App Store and Google Play

To download, scan the QR code or search [RightCapital](#)





# Mobile App Features

## Dashboard

- See net worth, probability of success, and accounts
- View all your financial accounts (bank, credit card, investment and loan) on the go
- Tap on individual accounts to access specific details

## Vault

- Upload a file from your phone or photo gallery
- Snap a photo of a document using your camera
- Download, rename, or delete existing files

## Investment

- See a detailed overview of your asset allocation
- Filter through accounts to see their individual asset allocation

## Tasks

- View all current and completed tasks
- Create tasks
- Mark tasks as complete

## Budget

- Set budget goals and track spending
- Use the Activity tab to identify spending patterns