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Guidelines for Right Capital Data Entry:

Dashboard (landing page) – Choose "Tasks" to view "Current Tasks"

Profile Tab:

This is where you create your "current plan" – a baseline that you define as the most likely current set of goals and assumptions

> Net Worth:

Bank, Investment - Everything that you have electronically linked in Investor 360 will automatically update here. Manual entries in 360 will come through based upon values entered, no automatic updates.

Card – Enter payment and interest rate details

Stock Plan – Send us your grant and/or vesting schedule, we will enter

Loan – Send us mortgage statements, we will enter

Property – Enter your rent or choose "Own" and enter your real estate taxes and annual maintenance costs

Insurance – Send us copies of your statements, we will enter

> Goals:

We ask that you customize your goals several days before your third meeting with us

Retirement related goals:

Expenses – Use the dropdown menu to access "A detailed worksheet". If you
are not already retired, you can use a simple estimate based off your Living
Expenses under the "Expenses" tab

Adding other goals:

- See drop down for a list of frequently used goal headings. For example, we recommend adding a Cash Reserve goal and Vacations (both pre and post retirement)
- o Be careful to fill in details such as start date, end date, frequency, etc.

> Income/Savings/Expenses:

These are tabs that relate to your working years only

Pension and Social Security – Send us copies of your statements, we will enter **Living Expenses** – Use the dropdown menu to access "A detailed worksheet". There are some expenses that are entered in other sections, such as taxes, housing costs, insurance premiums, including health insurance. The detailed worksheet lessens the risk of double entries.

> Family: Self Explanatory

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