TERRA BLUE
WEALTH MANAGEMENT

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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)
- 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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