

Combining all your financial data in one place is the starting point for higher quality financial decisions. A single view enables holistic decision making. No more making piecemeal or siloed decisions.

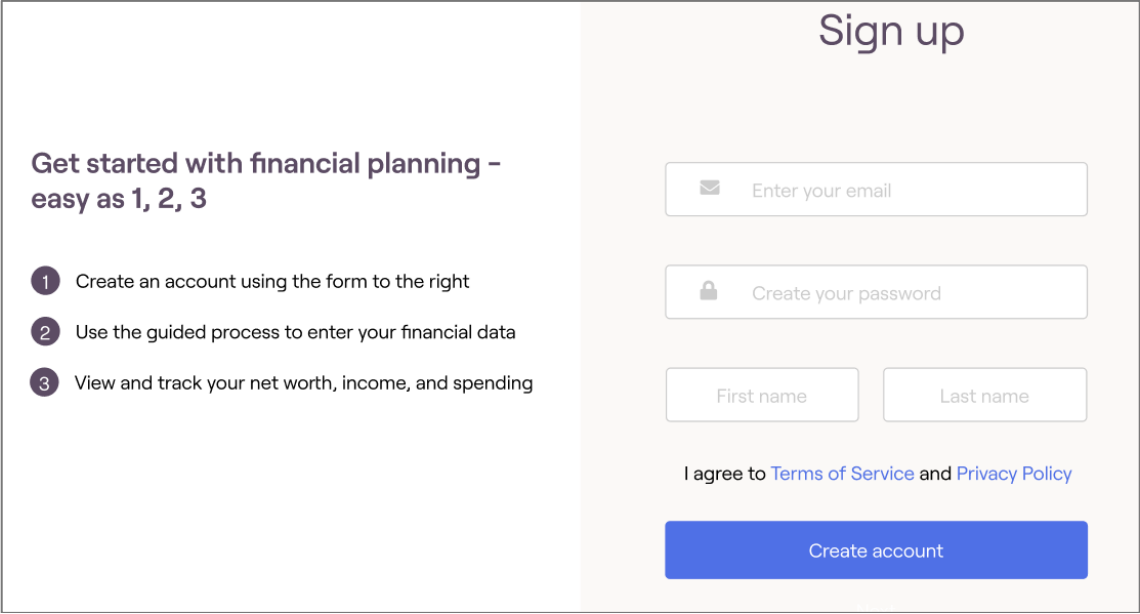
Set up your account today to unlock opportunities and ensure you're on the path to success.

RightCapital's Client Portal is easy-to-use, informative, secure.

Here are the key principles to an effective and enjoyable experience.

1. Account Setup

You'll receive a link to create your RightCapital account and a secure password. From there, jump to creating your profile.



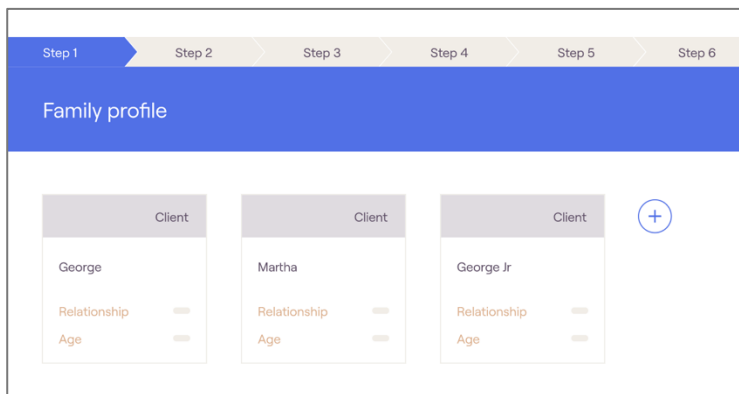
The screenshot shows a sign-up interface with a light gray background. On the left, there is a vertical sidebar with the heading "Get started with financial planning - easy as 1, 2, 3" and three numbered steps: 1. Create an account using the form to the right, 2. Use the guided process to enter your financial data, and 3. View and track your net worth, income, and spending. The main area on the right is titled "Sign up" and contains a form with the following elements: an email input field with an envelope icon and the placeholder "Enter your email"; a password input field with a lock icon and the placeholder "Create your password"; two separate input fields for "First name" and "Last name"; a checkbox with the text "I agree to [Terms of Service](#) and [Privacy Policy](#)"; and a prominent blue button labeled "Create account".

2. Profile

Your profile gives your advisor the necessary information to generate retirement analyses, answer questions, and refine your plan. Be thorough—your advisor can only advise on what they know about. Add your financial information here. Stop anytime and pick it up later.

Linking accounts, listing goals, and filling out the rest of your profile are the building blocks for everything else, such as your financial dashboard. With this information, tradeoffs and proposals can be refined to find the best outcomes for you.

Once your profile is complete, you can enjoy a 40,000-foot view of your financial status, and access other important communication tools built within RightCapital.



Tip: The tiles in your profile represent the full data set with which your advisor will build your plan. Want to explore options? Create “blank” tiles to incorporate in your plan. Want to see what it would look like to have a 529 account for your kids? Add a 529 account and leave the fields empty. Then talk to your advisor along the lines of “please include a 529 in the plan.”

3. Dashboard and Financial Sections

The dashboard has all the key elements for a financial overview. Review your balance sheet, check in on your portfolio, or measure progress on your goals. For instance, take a look at your financial plan's probability of success.



Tip: Reflect on these tools to help cultivate questions for your advisor. For example: “What would happen if we shifted our investments to be more aggressive?” “Can we hold more of our assets in tax advantaged accounts?” Becoming familiar with your overall financial picture will help you ask questions that may more quickly yield a successful roadmap for your financial future.

4. Vault

Use your vault to securely share and store documents. Upload statements or photos of life insurance coverage to incorporate them in your plan in a safe manner. Just click on the three dots in the top right and then click **“Vault”**.

Your vault contains a shared folder (between you and your advisor) and a private folder (only visible to you). You can save important personal documents to either folder for safe-keeping. Securely store items like photocopies of loan documents, insurance policies, birth certificates, etc. Think of it as your digital safe: any document you’d store in your home safe you can store in this vault.

Vault

The vault is a place where you can store important files that you can access from anywhere. Both you and your advisor can store files in the shared folder that you can both access. In addition, you can store files in your private folder that only you have access to.

Shared Folder
Private Folder

5. Tasks

RightCapital has a fantastic tool called Tasks to manage and collaborate on tasks. Just go to your Dashboard and then click on **“Tasks”**. During and after meetings with your advisor, create tasks to stay on the same page about making forward progress.

Current Tasks

Clients: All Clients v
Add Template Task v

Due date	Clients	Assign to	Tasks
Overdue			
<input type="checkbox"/> 12/07/2020	Sandro Rossitto	Jason Houle	! Add aggregated task list for advisors.
<input type="checkbox"/> 18/07/2020	Shuang Chen	Joe Cowling	i Task Management +

Next Steps

These are the keys to getting started. From there, share questions and collaborate with your advisor to develop a bright and healthy financial future.