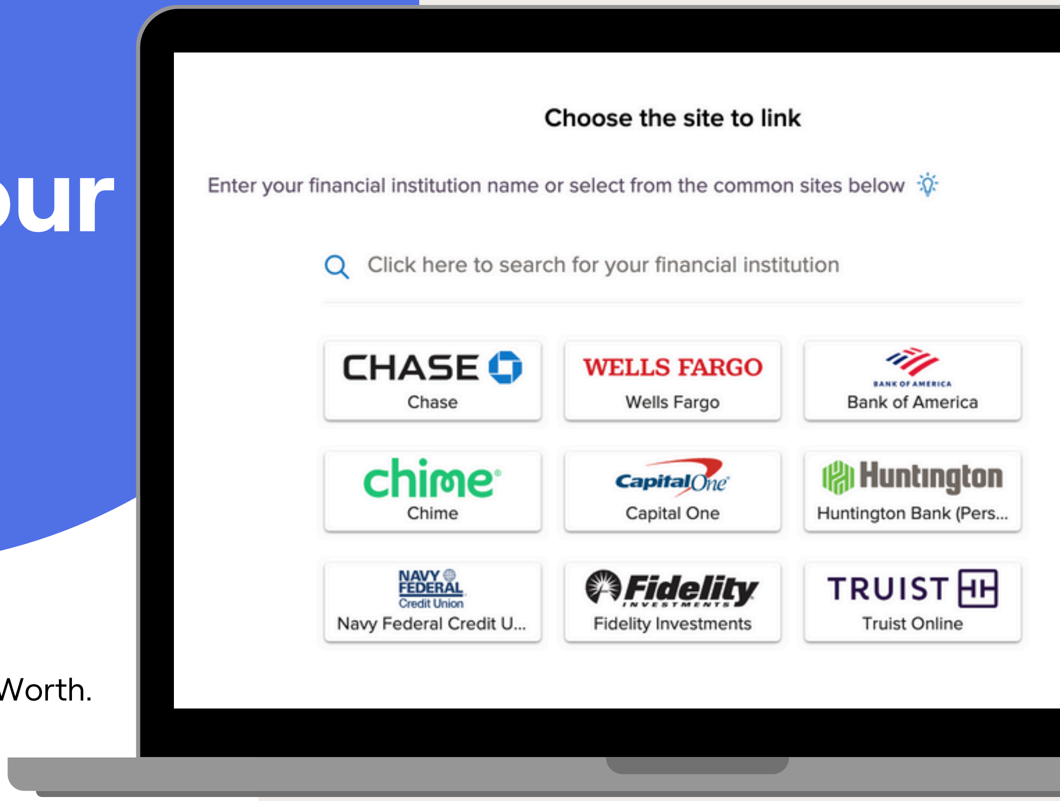
RightCapital

Linking Your Accounts



Step 1

Navigate to the Profile > Net Worth.

Step 2

Click on the Link Account button.

Step 3

A window will appear with a list of common sites to link to. If you don't see your institution listed, you can use the search bar at the top to search for your financial institution by name.

Step 4

After selecting a link option, follow the steps listed on your screen. This typically involves entering your credentials, and completing multi-factor authentication.

Step 5

Once your accounts appear, you can click the gear icon to rename an account or remove it from the data feed. Click the Close button to save your changes.

Tips

Have the URL that you use to log in to your financial institution outside of RightCapital?

You can often paste it into the search field in RightCapital to take you directly to the correct link option.

Please ensure that two-factor authentication is setup with your financial institution if applicable.

Note

Please do not close out the pop up window while you are completing these steps. Closing the window early may cause your accounts not to link.

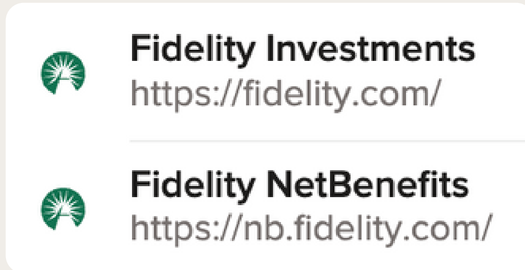
RightCapital

Additional Info

RightCapital allows you to link bank accounts, credit cards, loans, and investment accounts to your financial plan. Please note that insurance policies and properties are unable to be linked.

Finding the Correct Link Option

Some banks and financial institutions will provide you with several link options to choose from. In these cases, it can be helpful to double-check the login page that you use to sign in and view your accounts at that institution. Be mindful of the names and URLs for each link option, and choose the one that matches your login page.



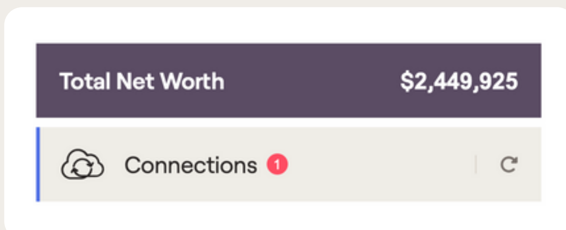
Pro Tip: Click a link option, and then click the blue hyperlink to see if the external site looks correct. You may also see a lightbulb icon, with a hyperlink directly to the login page.

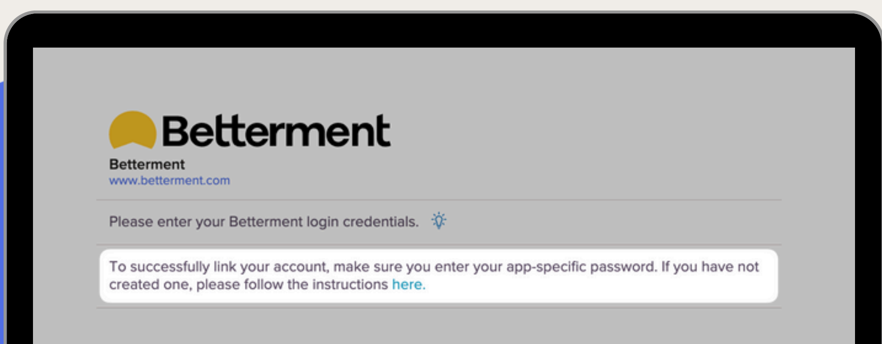
What happens once my accounts are linked?

Accounts will populate in the corresponding category of the Net Worth. Balances and other account details will update automatically going forward.

If a bank or credit card account is linked, RightCapital will retrieve up to three months worth of past transactions for use within the Budget Analysis module.

Some institutions will require you to log in again after a period of time to update the connection. You should log into your RightCapital plan often to ensure that your account information stays up to date. To manually trigger a refresh for all of your accounts, you can click the ⟳ manual refresh button under your current Net Worth.





Certain institutions have unique requirements that must be met before accounts can be linked in RightCapital. Please be mindful to read the message displayed before entering your credentials to be notified of such requirements, and to find further instructions.