



CLIENT PORTAL GUIDE OVERVIEW

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CLIENT LOGINS

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Portal Guides

Dear Client,

Welcome aboard! As part of your onboarding with our firm, we're excited to introduce you to the three client portals we use to streamline communication, planning, and access to your financial information. Each portal serves a unique purpose, and this letter will walk you through how and when to use each one.

Client Portal Overview :

1. ShareFile - *Your document Storage Vault (You already have access)*
2. Right Capital - *Your Financial Planning Tool Dashboard*
3. Osaic Account View - *Your Investment Performance Portal*

ShareFile

This was the first portal we introduced – where you uploaded your onboarding documents. Going forward, ShareFile will be the primary place for securely receiving and sending important documents.

RightCapital:

RightCapital is your personal financial dashboard and a key part of our planning process. You'll see this portal referenced during strategy sessions and annual reviews. It's where your financial plan lives, and where you can visualize your goals and track your progress.

We recommend connecting your outside accounts (bank, credit cards, mortgage, etc.) to give you a full picture of your financial life in one place.

Osaic Account View

Osaic provides the platform where you can view your investment accounts once they are established and funded. Through this portal, you'll be able to see real-time account balances and holdings, review historical investment data, and access your statements and trade confirmations. This portal will become relevant once your accounts are fully set up and funded.

Accessing the Portals

You can find login links for all three portals directly on our website for easy access at any time. If you have any questions or need assistance with any of the portals, please don't hesitate to reach out to our Client Relations team member, Jillian Thibodeau. You can contact her by email at jill@myvlwealth.com or by calling our office at 978-703-0020. We're here to help!

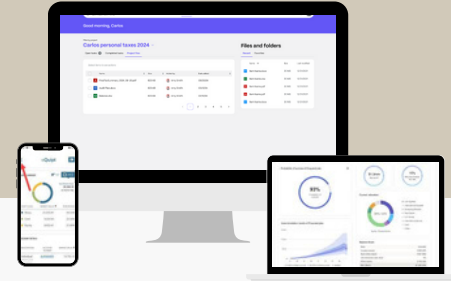
The best,

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CLIENT PORTALS

Understanding Your Client Portals
 What's the difference between each portal — and when should you use them?



*DOCUMENT VAULT

Purpose: Your secure document storage solution. Access and manage your documents and tax files all in one place with ease and security.

Think of it as: Your personal digital filing cabinet

✔ **What You Can Do:**

- Securely upload & view Financial and Tax Documents
- DocuSign Tax Documents from anywhere



*FINANCIAL PLANNING TOOL

Purpose: Interactive financial planning & budgeting tool

Think of it as: Your personal financial dashboard

✔ **What You Can Do:**

- View your full financial plan (goals, retirement, etc.)
- Link outside accounts (bank, mortgage, credit cards)
- Create budgets and track spending
- Run “what-if” retirement scenarios



*ACCOUNT VIEW

Purpose: View your investment accounts and financial activity, including historical data — for all accounts under management held with us.

Think of it as: Your official brokerage statement portal

✔ **What You Can Do:**

- View real-time account balances and holdings
- Track account performance, transactions and historical data
- Access electronic account statements and trade confirmations

When Should I use each portal?

	ShareFile	RightCapital	osaic
View investment performance and historical data			✔
Download statements and trade confirmations			✔
Track spending or budget		✔	
See your full financial plan		✔	
Link external accounts (bank, credit)		✔	
Upload/View Financial & Tax Documents	✔		

FAQ'S

Here are some quick links to help you get acquainted with each of our portals and get started. If you'd like to dive deeper, feel free to set up time with Jill at jill@myvlwealth.com!



[Access & Upload](#)

[Doc-u-sign](#)

[Mobile App Overview](#)



RightCapital

[Overview](#)

[Linking Bank Accounts](#)

[Mobile App Overview](#)

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[Access Guide](#)

[Overview](#)