

JANUARY IMPORTANT UPDATES:

- eMoney will no longer be available as of February 2025
- New Client Portals coming soon
- Our website is in the process of getting updated



January Updates

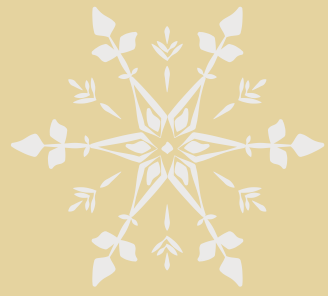
*Happy New Year!
We hope you all had a wonderful holiday season filled with joy, relaxation, and cherished moments with your loved ones.*

As we welcome in the new year, we're excited for the opportunities and growth ahead.



Monthly Newsletters

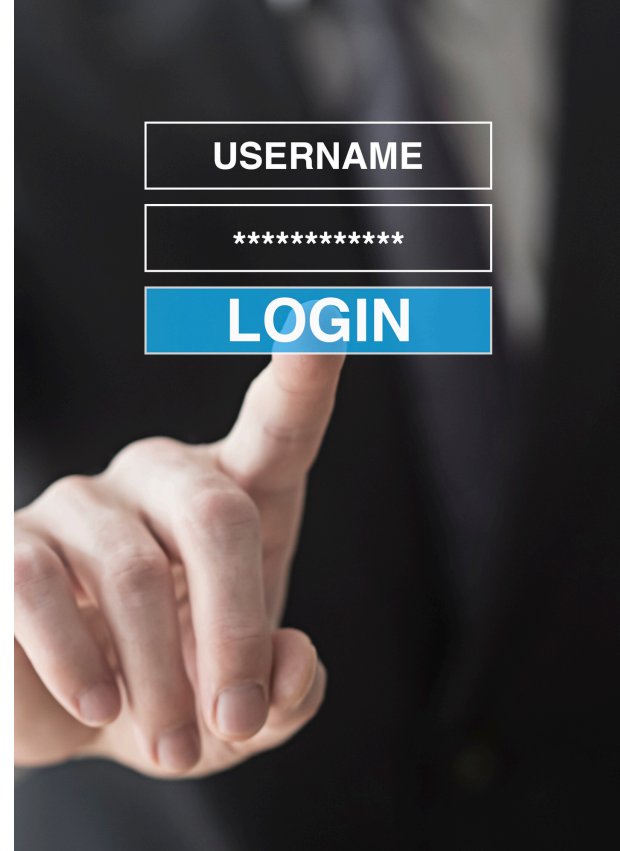
Stay informed with our monthly newsletters that will feature exciting and important updates coming up in the new year



Client Login Updates

As of February 2025, we will be upgrading our systems and moving away from the eMoney Portal. We're excited to announce we'll be offering three specialized portals, each designed to give you more control and convenience. We'll be providing more details on how to access and use these portals in the coming weeks!





We're here to assist you every step of the way during this transition. Please bear with us as we work to provide everyone with access to the new portals. We'll be providing more details on how to access and use these portals in the coming weeks, and our team will be available to help you log in and get comfortable with the new systems.



If you have any documents stored in the eMoney Portal under “My Private Documents” please log in and download them before February 2025 to ensure you have everything you need for your records. We will be moving your files to your new client vault (*sharefile*) but we do not have access to your private documents



Client Platforms

-  **eMoney Client portal will no longer be available as of February 2025.**
-  **Right Capital** is your interactive planning portal for your Financial Investment, Retirement and Tax Planning
-  **Sharefile** is your secure *document vault* to upload and view your investment documents, tax files and shared files.
-  **Osaic Account View** provides a comprehensive view of all accounts in one view, including historical data and detailed insights

Please click here to request access to your client portal:

**Scroll down and fill out “request access to your account form”*

[LOGIN ACCESS](#)