



RightCapital Vault

RightCapital is not only a financial planning and debt management tool - it also features an online filing cabinet called the Vault, to which you can upload files of your important documents! Documents stored in the Vault can be accessed from anywhere and even be shared between you and your Advisor/Tax Preparer when uploaded to the shared folder.

Why the Vault is a helpful tool:

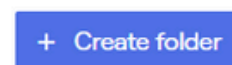
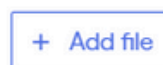
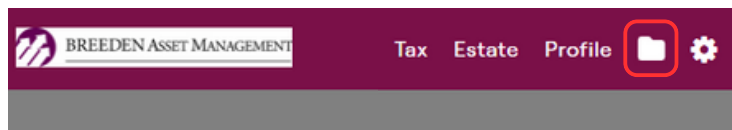
- The Vault allows us to securely collect files, like tax documents, when you can't make it into the office. We are also able to upload documents for you to view and download on your personal computer.

Documents you can securely store:

- Wills
- Trusts
- Property Deeds
- Car Titles
- Life Insurance Policies
- Tax Returns
- Business Financial Statements

How to access the Vault:

1. Log into your RightCapital account by going to www.rightcapital.com/login.
2. Enter your email and the password you created.
3. Once logged in, click the file folder icon at the top right corner, this will bring you to the vault (see image below).
4. In the Vault, under the Shared tab you can add individual files or create a folder to store multiple files. To add files, click on "Add File" then select the document(s) on your computer (or drag and drop into the upload screen). The final step is to click the "Add to vault" button in the bottom right-hand corner. Then you should see the documents recently uploaded in your Vault.



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