

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.

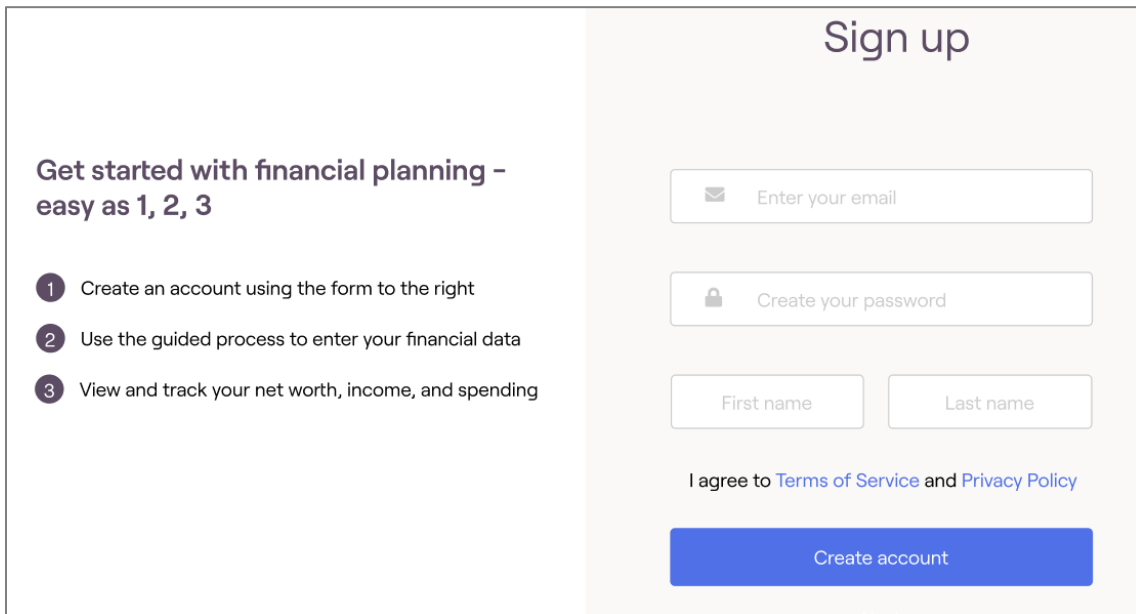
Set up your account today to unlock opportunities and ensure you're on the path to success.

## **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.



**Get started with financial planning - easy as 1, 2, 3**

- 1 Create an account using the form to the right
- 2 Use the guided process to enter your financial data
- 3 View and track your net worth, income, and spending

**Sign up**

Enter your email

Create your password

First name Last name

I agree to [Terms of Service](#) and [Privacy Policy](#)

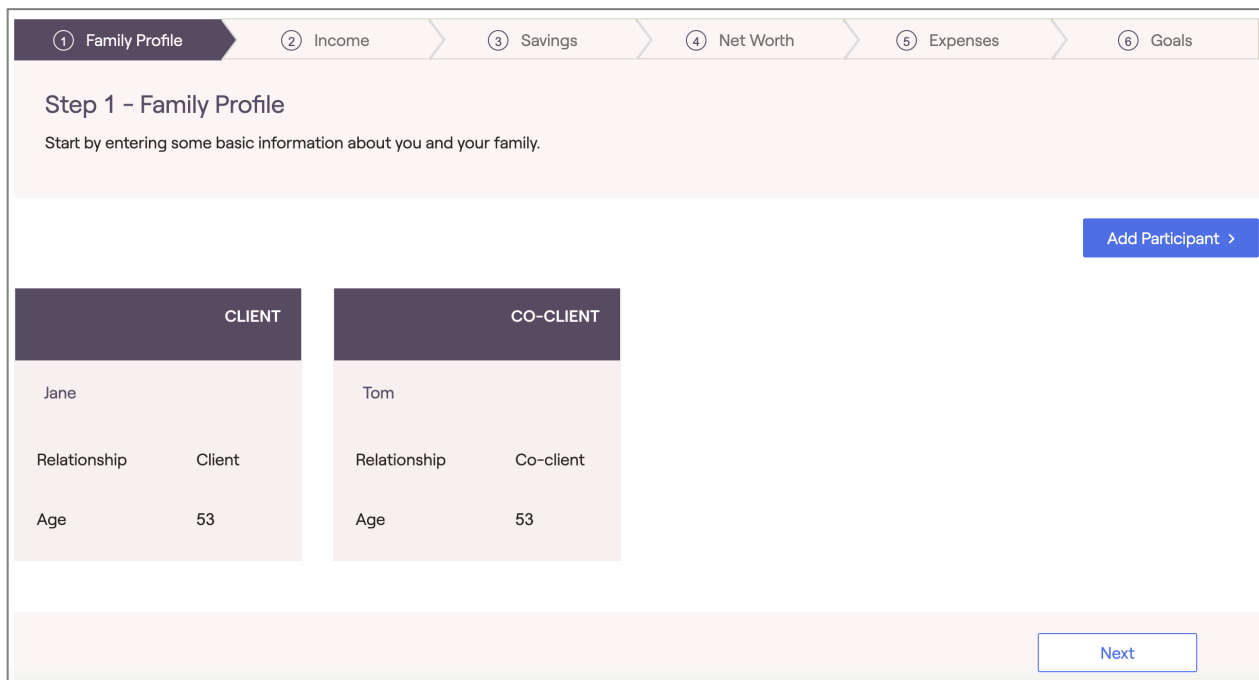
Create account

## 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.



1 Family Profile   2 Income   3 Savings   4 Net Worth   5 Expenses   6 Goals

Step 1 - Family Profile

Start by entering some basic information about you and your family.

Add Participant >

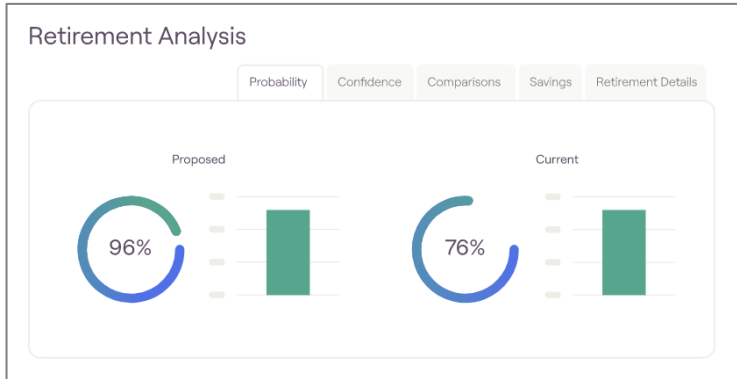
CLIENT		CO-CLIENT	
Jane		Tom	
Relationship	Client	Relationship	Co-client
Age	53	Age	53

Next

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.

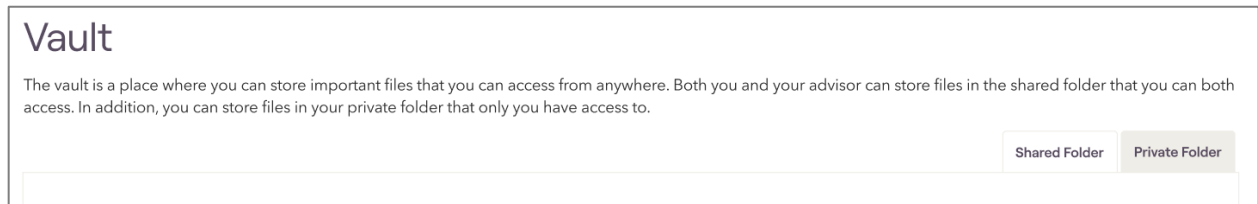


Tip: Reflect on these tools to help cultivate questions for your advisor. For example: “What would happen if we shifted our investments to be more aggressive?” “Can we hold more of our assets in tax advantaged accounts?” Becoming familiar with your overall financial picture will help you ask questions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

### 4. Vault

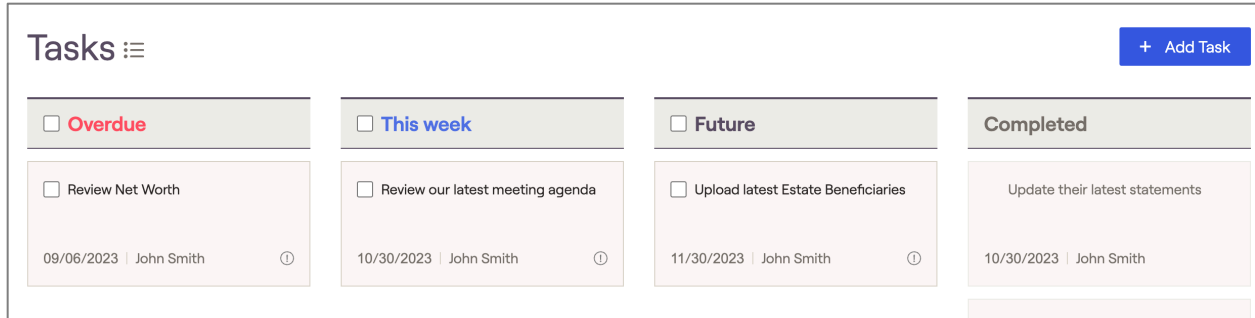
Use your Vault to securely share and store documents. Upload statements or photos of life insurance coverage to incorporate them in your plan in a safe manner. Just click on the “Folder” icon in the top right-hand corner to access your Vault.

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.



## 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.



The screenshot shows the 'Tasks' dashboard interface. At the top left is the title 'Tasks' with a menu icon, and at the top right is a blue '+ Add Task' button. Below the title are four filter tabs: 'Overdue' (with a red checkmark), 'This week' (with a blue checkmark), 'Future' (with a grey checkmark), and 'Completed' (with a grey checkmark). The main area contains a grid of task cards. Each card has a title, a due date, the name 'John Smith', and a help icon. The tasks are: 'Review Net Worth' (due 09/06/2023), 'Review our latest meeting agenda' (due 10/30/2023), 'Upload latest Estate Beneficiaries' (due 11/30/2023), and 'Update their latest statements' (due 10/30/2023).

Overdue	This week	Future	Completed
<input type="checkbox"/> Review Net Worth 09/06/2023   John Smith ⓘ	<input type="checkbox"/> Review our latest meeting agenda 10/30/2023   John Smith ⓘ	<input type="checkbox"/> Upload latest Estate Beneficiaries 11/30/2023   John Smith ⓘ	<input type="checkbox"/> Update their latest statements 10/30/2023   John Smith

## 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.