


Setting Up Your Financial Planning Website

<https://www.rightcapital.com/login?cobrand=5XJ2-S5P37yK6t6n9mHwkQ&type=client>

Click the “Sign Up” link you received in email titled: “Log in to your financial planning account.” Set up your Password.

Step 1) Family Profile



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.

CLIENT		CO-CLIENT	
Name	Jim	Name	
Relationship	Client	Relationship	Co-client
Age	48	Age	48
Middle name	<input type="text"/>	Last name	Halpert
Title	<input type="text"/>	Suffix	<input type="text"/>
Birthdate	01/01/1970	Planning horizon	90
Residence state	Texas		
		Cancel	Save

Add Participant

If you have a spouse, you can add them, here

If you have children, you can add them, here

Step 2) Income

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

Step 2 - Salary and other Income

Click each "Salary" box to open and edit your salary information. Let us know if you're already receiving Social Security. And if you have alternate sources of income, click the "Add Income" button to incorporate them into your plan.

Input your salary, here

You spouse's income, here

If you receive bonuses or other income add that here

Step 3) Savings

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

Step 3 - Retirement Saving Plans

If you are currently contributing a portion of your salary to a 401(k) or 403(b) plan, click the box below to enter the details. And if you have a cash balance, health savings, or Roth 401(k) plan, use the "Add Saving" button to include them.

If you are contributing to your 401(k), add this information

If you contribute a fixed dollar amount instead of a %, then change this

If you consistently contribute to an HSA or IRA you can add that, here

Step 4) Net-Worth

Net Worth		\$ 0
BANK	\$ 0	>
Manual	\$ 0	✕
CARD	\$ 0	>
INVESTMENT	\$ 0	>
STOCK PLAN	\$ 0	>
LOAN	\$ 0	>
PROPERTY	\$ 0	>
INSURANCE	\$ 0	>
OTHER	\$ 0	>

Manual Balance \$ 0

Account name: Jim's Bank Account Included in plan

Account type: Checking Owner: Jim

Balance: \$ 0

This is where you can link your financial accounts, bank accounts, 401(k), credit card, mortgage, etc.

All of your information is kept secure and encrypted. The website is not transactional, it only can view the information from the linked accounts.

Linking your accounts will keep your financial plan up to date at all times.

Net Worth		\$ 0
BANK	\$ 0	>
CARD	\$ 0	>
INVESTMENT	\$ 0	>
Manual	\$ 0	✕
STOCK PLAN	\$ 0	>
LOAN	\$ 0	>
PROPERTY	\$ 0	>
INSURANCE	\$ 0	>
OTHER	\$ 0	>

Manual Balance \$ 0

Account name: Jim's Investment Account Included in plan

Account type: Taxable Account Owner: Jim

Cash: \$ 0 Managed

If you cannot link your account, you can add your account here.

Then you can add the details of your account, here.

We will review all of this information in the next meeting, so you do not need to worry about getting everything 100% correct. It will just be beneficial to have some high-level information for the meeting.

Step 5) Expenses

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

Step 5 - General Expenses

Type in your estimated general monthly expenses - not including the mortgage or insurance premiums that you already captured in the previous step. Also, use the "Add Expense" button to add any other specific expenses that you want to capture.

Add Expense >

LIVING EXPENSES		TAX AND FEES	
Pre-retirement Living Expenses		Tax Expense and Fees	
Monthly expenses	\$ 0	Local tax	0%
		Filing status	Joint

Living expenses should reflect your average monthly expenses prior to retirement, exclusive of any other expenses you have entered such as mortgage, debt, or insurance payments.

Cancel Save

Add your **monthly** living expenses, here, excluding your mortgage payments, student loan payments, and taxes.

Step 6) Goals

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

Step 6 - Financial Goals

We know retirement is a goal for everyone, so finish up the process by entering your projected retirement age. And then use the "Add Goal" to incorporate any other financial goals you have - a new car, vacation plans - anything you'd like!

Add Goal >

RETIREMENT		RETIREMENT		RETIREMENT		RETIREMENT	
Retirement Age		Retirement Expense		Annual Retirement Health Cost		Annual Retirement LTC Cost	
Jim	65			Jim	\$ 5,238	Jim	\$ 41,400
Co-client	65	Monthly expense	\$ 0	Co-client	\$ 5,238	Co-client	\$ 41,400

We will flesh out most of your goals during our meetings, but for now you can add the age you would like to be able to retire.

Previous Complete

Click Complete

Final Step) The Vault

Finally, I will need your help in collecting financial documents.

SDG Financial Planning The Vault is a secure way to share documents with me. PROFILE 1. [Settings Gear]

2. VAULT SECURITY NOTIFICATIONS SIGN OUT

Vault

The vault is a place where you can store important files that you can access from anywhere. Both you and your advisor can store files in the shared folder that you can both access. In addition, you can store files in your private folder that only you have access to.

Shared Folder Private Folder

3. + Add file + Create folder

File name Upload date

Please upload as many as these documents as you have available

- Budget
- Recent Tax Return
- Paystub
- Employee Benefit Information
- Brokerage Statement
- Will / Trust

Thanks for Completing the Onboarding Process!

I look forward to meeting with you again soon!