

RightCapital's Client Portal is easy-to-use, informative, and secure.

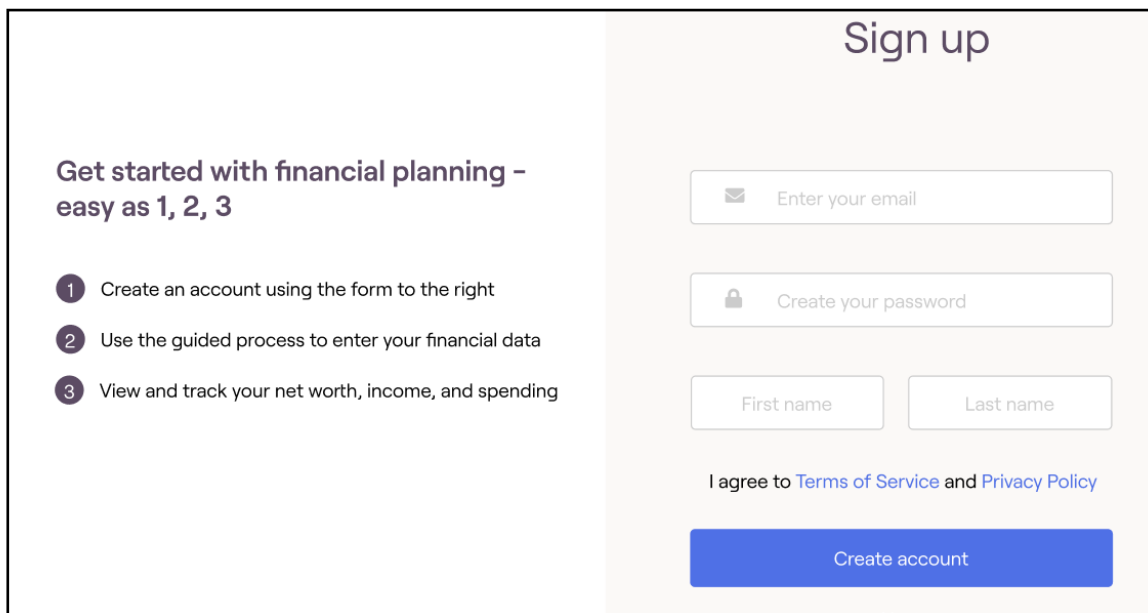
Combining all your financial data in one place is the starting point for higher quality financial decisions. A single view enables holistic decision making that interweave all your financial matters. No more making piecemeal or single life financial facet decisions.

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

Here are the key principles to an effective and enjoyable experience.

1. Account Setup:

You will receive a link to create your RightCapital account and a secure password. From there, jump to creating your profile.



The screenshot shows a 'Sign up' form with a two-column layout. The left column contains a heading 'Get started with financial planning - easy as 1, 2, 3' and a numbered list of three steps: 1. Create an account using the form to the right, 2. Use the guided process to enter your financial data, and 3. View and track your net worth, income, and spending. The right column contains the registration form with fields for email, password, first name, and last name, followed by a checkbox for terms and privacy policy, and a 'Create account' button.

Sign up

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

Enter your email

Create your password

First name Last name

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

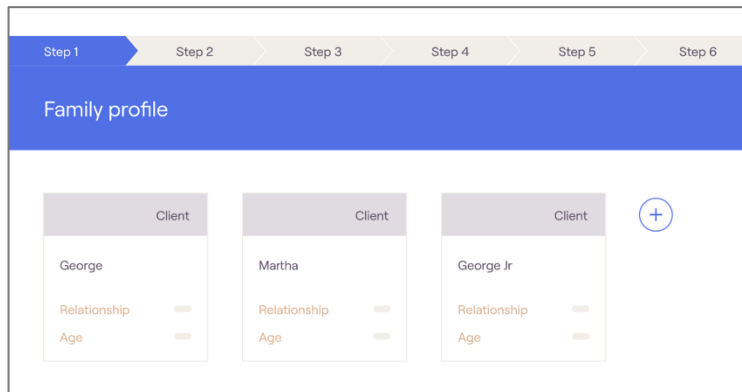
Create account

2. Profile:

Your profile gives your advisors at Legacy Wealth Partners the necessary information to generate retirement analyses, answer questions, and refine your plan. Be thorough — as we 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.

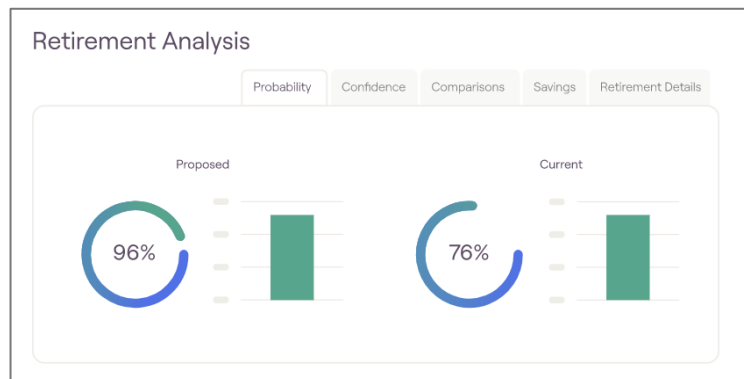
Once your profile is complete, you can enjoy a 40,000-foot view of your financial status, and access other important communication tools built within RightCapital.



Tip: The tiles in your profile represent the full data set with which we 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 Legacy Wealth Partners 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 during our Planning time together. 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 gear icon in the top right and then click **"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.

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

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 at Legacy Wealth Partners, create tasks to stay on the same page about making forward progress.

Current Tasks

Clients: All Clients
Add Template Task

Due date	Clients	Assign to	Tasks
Overdue			
<input type="checkbox"/> 12/07/2020	Sandro Rossitto	Jason Houle	Add aggregated task list for advisors.
<input type="checkbox"/> 18/07/2020	Shuang Chen	Joe Cowling	Task Management

6. Next Steps:

We appreciate your partnership with us as your trusted financial advisors and look forward to engaging with you to identify, create and execute your Legacy Goals!

All the best,

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Linking Your Accounts



Linking your accounts is quick and easy. Just follow the steps below:

1. Log in to your RightCapital portal (either on your computer or mobile device)
2. Go to your profile => Net Worth
3. Use the green "Link Account" button on the Net Worth screen to link accounts from a financial institution
4. Selecting "Link Account" displays a dialogue box with quick links to common institutions and a thorough search feature to find available institutions. To search, type the name of the institution in the search box (not the URL)
5. Enter the username and password that you use to log into that financial institution's website

NOTE: The accounts will begin to sync unless additional information is required (e.g., two-factor authentication). Please ensure that two-factor authentication is enabled if applicable.

Please do not close the web window during the syncing process.

Important Information:

It is important to know that some links will require you to re-enter your username, password, and two-factor authentication information to refresh the account. You should log in frequently to ensure the link is refreshing successfully. You can select the manual refresh button next to Net Worth. If the link option appears under "import in progress," this could mean the link requires your information to be entered again.

At various institutions, passwords are set to expire after a period of time. If this happens, first update your password at your financial institution and then update the connection on your portal.

Insurance plans cannot be linked.

If linking an Employee Stock Ownership Plan or Employee Stock Purchase Plan, the aggregator may provide us with the share value, but not the individual options.

What Happens Once Login Credentials are Entered?

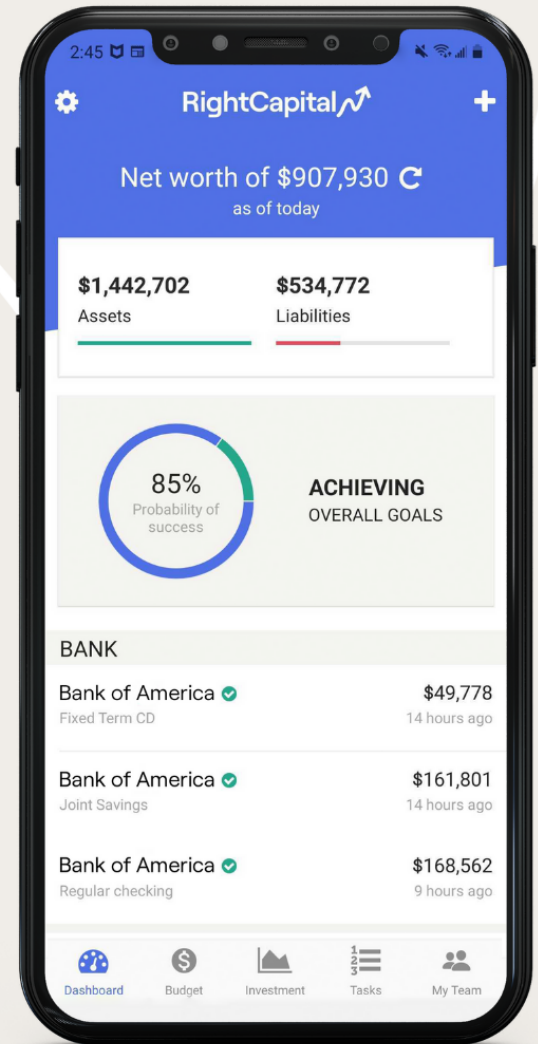
The information provided will be used to retrieve balance and position information, as well as to create a link to the account that RightCapital will use to update those values at each new login session to RightCapital.	If a bank or credit card account is linked, RightCapital will retrieve the past three months of transactions for use within the Budget tool.	Depending on the number of accounts and transactions at the financial institution, it may take a few moments to import the information. During import, accounts may not display on the account list.	Accounts will generally update daily, but may update less frequently depending on the type of authentication used. To refresh all connections, click on the circular arrow to the right of the Net Worth value
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See your finances on the go

Mobile App For Android and iOS

- Link accounts and view balances
- View your asset allocation
- Review budget and categorize transactions
- See options to view your probability of success
- Receive notifications regarding upcoming tasks
- View advisor contact information

Before downloading the app, make sure that you've been added and invited to the client portal and that you've set up your RightCapital account.



1. Search for RightCapital
2. Click blue "Get" button
3. Click blue "Open" button
4. Insert login information when prompted



1. Open the Play Store
2. Search for RightCapital
3. Click green "Install" button
4. Click green "Open" button when complete

Note: Icon will appear as RightCapital on menu screen on phone.

Securities and advisory services offered through Commonwealth Financial Network®, Member FINRA/SIPC, a Registered Investment Adviser.

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